MARKETING COLLATERAL - 1992



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INPUT PROGRAM FEE SCHEDULE

Effective August 3, 1992

Information Services Market Analysis Including Issue Reports	$35,000
Information Services Market Analysis Delivery Modes Only	17,500
Information Services Market Analysis Market Sectors Only	17,500
Systems Integration	17,500
Outsourcing Information Systems (Systems Operations)	17,500
EDI/Electronic Commerce	12,500
Information Services Vendor Analysis	12,500
Downsizing Information Systems	12,500
Federal Information Technology Procurement Analysis (U S. Federal Government)	15,000
Federal Information Technology Market Analysis (U S. Federal Government)	15,000

All programs include two sets of deliverables.
Second site at 50% of full fee.

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Client Customized Programs and Library Pricing

Level 1 Commitment: $15,000

- Hotline at no charge (one person)
- One day of on-site custom consulting at no charge
- Two tickets to client's choice of any INPUT conferences at no charge
- 20% discount on all reports
 (the $15,000 level requires the purchase of $18,750 reports at list fees)
- Additional sites offered for 50% of full price
- Access to INPUT's research libraries

Level 2 Commitment: $28,000

All of the benefits of level 1 plus...

- Hotline at no charge (two people)
- Three days custom consulting
- Four tickets to client's choice of any INPUT conferences
- 20% discount on all reports
 (the $28,000 level requires the purchase of $35,000 reports at list fees and/or INPUT programs)

U.S. Information Center (Library): $75,000

- All INPUT U.S. research for a single site
 (copy of reports, 10 copies of research bulletins for distribution)
- Hotline for one person
- Second site programs including hotline for one person for 50% of the program fee
- Additional library sites at $25,000

Worldwide Information Center (Library): $140,000

Same as the U.S. Information Center, but includes two sites for all research and deliverables. (limit of one European site)

- Additional library sites at $35,000

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All programs include two sets of deliverables.
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- Second site programs including hotline for one person for 50% of the program fee
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Worldwide Information Center (Library):$140,000

Same as the U.S. Information Center, but includes two sites for all research and deliverables. (limit of one European site)

- Additional library sites at $35,000

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memo:

Date: 8/21/92

To: Judy, Paul, Mark, Nancy, Bob, Chris, Scott, Tetsuo

From: Andrea

Subject: **UK Price List**

A couple of minor corrections on codes.

Subject: **UK Price List for European Reports Catalog**

Corrections on prices; list completed.

EUROPEAN SOFTWARE AND SERVICES MARKET STUDIES

INPUT

FEE SCHEDULE

Software and Services Industry Reports

Issue Reports

MEUM1	The Impact of UNIX on Western European Software and Services (May 1991)	$3,000
MESM1	Operational Software Support and Maintenance Opportunities in Western Europe (April 1991)	$3,000
MEET1	Opportunities for IS Training in western Europe 1991-1996 (August 1991)	$3,000
MECO1	Collaboration and M&A Issues in Western Europe 1991 (December 1991)	$3,000
IERE2	Software Re-engineering in Europe (Quarter 2 1992)	$3,000
IEOS2	IT Services—Growth or Decline? Quarter 3 1992)	$3,000
IEEA2	IT Spending Patterns—Europe 1992-1997 (Quarter 3 1992)	$3,000
IEVP2	Leading Vendor Competitor Analysis (Quarter 4 1992)	$9,900

Market Forecast Reports

MEAR1	The Western European Market for Computer Software and Services 1991-1996 (December 1991, 1992 edition due quarter 4 1992)	$3,000
MEPR1	Processing Services Markets Western Europe 1991-1996 (October 1991)	$3,000
MEPS1	Professional Services Markets Western Europe 1991-1996 (November 1991)	$3,000
MEAS1	Application Solutions Opportunities Western Europe 1991-1996 (October 1991)	$3,000
MEYS1	Systems Software Products Market Western Europe 1991-1996 (November 1991)	$3,000

Country Market Reports

XEML1	U.K. Professional Services Manpower Pricing 1991 (December 1991, 1992 edition quarter 4 1992)	$3,000
MEUK1	The U.K. Market for Computer Software and Services 1991-1996 (November 1991)	$3,000
MEBE1	The Benelux Market for Computer Software and Services 1991-1996 (November 1991)	$3,000
MENR1	The Nordic Market for Computer Software and Services 1991-1996 (November 1991)	$3,000
MEDR1	The Market for Computer Software and Services in Germany, Austria and Switzerland (November 1991)	$3,000
MELA1	The Market for Computer Software and Services in France, Italy and Spain (December 1991)	$3,000

Industry Sector Reports

MEIB2	Banking and Finance (Quarter 4 1992, 1991 edition available)	$3,000
MEII2	Insurance (Quarter 4 1992, 1991 edition available)	$3,000
MEID2	Discrete Manufacturing (Quarter 3 1992, 1991 edition available)	$3,000
MEIP2	Process Manufacturing (Quarter 3 1992, 1991 edition available)	$3,000
MEIR2	Retail and Wholesale Distribution (Quarter 4 1992, 1991 edition available)	$3,000
IEIG2	Software and Services Opportunities in National Governments (Quarter 3 1992)	$3,000
IEIT2	Software and Services Opportunities in Transportation (Quarter 2 1992)	$3,000

Customer Services Reports

Professional Services Reports

CEES1	Environmental Services Opportunities in Western European Customer Services 1991-1996 (June 1991)	$3,000
CESW1	Systems Software Support Issues in Western Europe 1991-1996 (June 1991)	$3,000
CECS1	VAR Markets and Support Issues in European Customer Services 1991-1996 (September 1991)	$3,000
CEVS2	Professional Services Strategies (Quarter 3 1992)	$3,000
CEDT2	Impact of Downsizing on Customer Services Organisations (Quarter 2 1992)	$3,000
CERS2	Open Systems Services (Quarter 3 1992)	$3,000

Market Forecast Reports

CEIM1	Independent Maintenance Market Western Europe 1991-1996 (August 1991)	$3,000
CESM2	Customer Services Market Analysis and Forecast (Quarter 2 1992, 1991 edition available)	$4,000
CEIM2	Multivendor Maintenance Markets (Quarter 2 1992)	$4,000

User Satisfaction Analysis

IT Customer Services Satisfaction Analysis (Quarter 4 1992, 1991 editions available)

CEUS1/UL2	Large Systems	$5,000
CEUM1/UM2	Medium Systems	$5,000
CEUP1/US2	Small Systems	$5,000
CETP1/S2	IT Customer Services Trends and Issues (Quarter 4 1992, 1991 edition available)	$5,000

Monthly Publication

CEQSR	Service Update	$4,000

Piccadilly House, 33/37 Regent Street, London SW1Y 4NF, England; Tel. (071) 493-9335; Fax (071) 629-0179
Sudetenstrasse 9, W-6306 Langgöns-Niederkleen, Germany; Tel. 0 6447-7229; Fax 0 6447-7327
24, avenue du Recteur Poincaré, 75016 Paris, France; Tel. (1) 46 47 65 65; Fax (1) 46 47 69 50

8/21/92 Rev.

Systems Integration Reports

Market Report

SEIM2 Systems Integration Markets 1992-1997 (Quarter 3 1992, 1991 edition available) $5,500

User Report

SEIC1 Systems Integration User Issues (July 1991) $3,000

Vendor Reports

SEIV1 Systems Integration Vendor Issues (May 1991) $3,000

SEIV2 Methods for Successful Systems Integration Projects (Quarter 2 1992) $3,000

SEVP2 Systems Integration Vendor Analysis (Quarter 4 1992) $5,500

Issue Reports

SEIS1 Imaging Systems in Western European Systems Integration Markets (December 1991) $3,000

SEIN2 Impact of Downsizing on Systems Integration (Quarter 2 1992) $3,000

SEIC2 Systems Integration Opportunities in Re-engineering (Quarter 4 1992) $3,000

Outsourcing Information Systems Reports

Market Reports

OEMF2 Information Systems Outsourcing Markets 1992-1997 (Quarter 3 1992) $5,500

User Report

SESC1 User Attitudes to Outsourcing (December 1991) $3,000

Vendor Reports

SESV1 The Profitability Challenge, Systems Operations (December 1991) $3,000

OEVP2 Information Systems Outsourcing Competitive Analysis (Quarter 4 1992) $5,500

Issue Reports

SENM1 Network Management as a Systems Operations Outsourcing Opportunity (May 1991) $3,000

OEOS2 Outsourcing Systems Operations (Quarter 2 1992, 1991 edition available) $3,000

OECS2 Outsourcing Network Management and Operations (Quarter 3 1992) $3,000

OEAM2 Outsourcing Applications Management (Quarter 4 1992) $3,000

OEDT2 Outsourcing Desktop Services (Quarter 2 1992) $3,000

Network Services Reports

Market Reports

NENS2 Network Services Market Opportunities 1992-1997 (Quarter 4 1992, 1991 edition available) $6,000

NEED1 The Western European EDI Market 1991-1996 (December 1991) $3,000

NENF1 Financial Network Services Western Europe 1991-1996 (December 1991) $3,000

User Reports

NEIS1 User Issues in Network Services Western Europe 1991-1996 (May 1991) $3,000

NECN2 Major Corporate Network Management Requirements (Quarter 4 1992) $6,000

NECS2 Network Services Customer Satisfaction (Quarter 4 1992) $6,000

NEEU2 End User Network Services (Quarter 4 1992) $6,000

Vendor Report

NEVR2 Network Services Competitive Analysis (Quarter 4 1992) $6,000

Issue Report

NETO1 Opportunities in ISDN and Other Emerging Technologies Western Europe 1991-1996 (June 1991) $3,000

INPUT Subscription Services

Information Services Industry Programme $22,000

Customer Services Programme $31,900

Systems Integration Programme $19,000

Outsourcing Information Systems Programme $19,000

Network Management Services Programme $31,000

Information Services Program—Europe
Pricing

1. Full IEMAP Program - $22,000 (Based on$2.00 per Pound Sterling)

Component	Wholesale ($)	Retail ($)
Information Services Market Forecast Database	3,500	8,400
Software and Services Opportunities in National Governments	1,500	3,000
Software and Services Opportunities in Transportation	1,500	3,000
Software and Services Market		
Insurance	1,500*	3,000
Banking & Finance	1,500*	3,000
Discrete Manufacturing	1,500*	3,000
Process Manufacturing	1,500*	3,000
Retail & Wholesale Distribution	1,500*	3,000
Software Re-engineering in Europe	1,500	3,000
IT Services—Growth or Decline?	1,500	3,000
IT Spending Patterns—Europe, 1992-1997	1,500	3,000
Leading Vendor Competitor Analysis	4,000	9,900
Research Bulletins	NC	NA
Hotline	1,500	2,000
Client Meetings	NC	NA
Annual Presentation	1,600	3,000
TOTAL	25,600	53,300

* $790 to subscribers to 1991 edition

PROGRAM PRICING

- Minimum IEMAP subscription to qualify for Wholesale Component prices is $15,000
 Full renewal price is $19,900

- Added Site Subscriptions:
 - $7,500 (New client)
 - $6,500 (Renewal Client)

- Extra copies - $790 per report

- *New Subscribers* - All new clients to receive prior year's *Market Analysis Report* with subscription.

- All other reports available to new subscribers at wholesale prices.

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2. Report Pricing

CODE	Component	Wholesale ($)	Retail ($)
1992 MARKET REPORTS			
IECM2	Information Services Market Analysis Frcst Database	3,500	8,400
IEIG2	Software and Services Opportunities in National Governments	1,500	3,000
IEIT2	Software and Services Opportunities in Transportation	1,500	3,000
	Software and Services Market		
IEII2	Insurance	1,500*	3,000
IEIB2	Banking & Finance	1,500*	3,000
IEID2	Discrete Manufacturing	1,500*	3,000
IEIP2	Process Manufacturing	1,500*	3,000
IEIR2	Retail & Wholesale Distribution	1,500*	3,000
1992 ISSUE REPORTS			
IERE2	Software Re-engineering in Europe	1,500	3,000
IEOS2	IT Services—Growth or Decline?	1,500	3,000
IEEA2	IT Spending Patterns—Europe, 1992-1997	1,500	3,000
IEVP2	Leading Vendor Competitor Analysis	4,000	9,900
IEMAP	Research Bulletins	NC	NA

* $790 to subscribers to 1991 edition

1991 REPORTS			
MEARI	W. E. Market Forecast for Computer Software & Services	1,500	3,000
MEPR1	Processing Services Opportunities	1,500	3,000
MEPS1	Professional Services Opportunities	1,500	3,000
MEAS1	Software Applications Solutions Opportunities	1,500	3,000
MEYS1	Systems Software Products Opportunities	1,500	3,000
MESM1	Software Applications Maintenance	1,500	3,000
MEUM1	UNIX Market Opportunities	1,500	3,000
MECO1	Collaboration and M & A Issues	1,500	3,000
MEID1	Manufacturing - Discrete	1,500	3,000
MEIP1	Manufacturing - Process	1,500	3,000
MEIB1	Banking & Finance	1,500	3,000
MEII1	Insurance	1,500	3,000
MEIR1	Distribution	1,500	3,000
MEET1	Education & Training	1,500	3,000

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Customer Services Program—Europe
Pricing

1. Full CECSP Program - $31,900 (based on $2.00 per Pound Sterling)

Component	Wholesale ($)	Retail ($)
Professional Services Strategies	1,500	3,000
Impact of Downsizing on Customer Services Organisations	1,500	3,000
Open Systems Services	1,500	3,000
IT Customer Services Market, 1992-1997	2,500	4,000
European Multivendor Maintenance Markets, 1992-1997	2,500	4,000
IT Customer Services Satisfaction Analysis		
Large Systems	3,000	5,000
Midrange Systems	3,000	5,000
PCs/Workstations	3,000	5,000
It Customer Services Trends and Issues	3,000	5,000
Monthly Service Update	2,000	4,000
Hotline	1,500	2,000
Client Meetings	NC	NA
Annual Presentation	1,600	2,400
TOTAL	26,600	45,400

PROGRAM PRICING

- Minimum CECSP subscription to qualify for Wholesale Component prices is $15,000
 Full renewal price is $29,900

- Added Site Subscriptions:
 - $9,000 (New client)
 - $7,900 (Renewal Client)

- Extra copies - $790 per report

- *New Subscribers* - All new clients to receive prior year's *Market Analysis Report* with subscription.

- All other reports available to new subscribers at wholesale prices.

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2. Report Pricing

CODE	Component	Wholesale ($)	Retail ($)
1992 REPORTS			
CEVS2	Professional Services Strategies	1,500	3,000
CEDT2	Impact of Downsizing on Customer Services Organisations	1,500	3,000
CERS2	Open Systems Services	1,500	3,000
CESM2	IT Customer Services Market, 1992-1997	2,500	4,000
CEIM2	European Multivendor Maintenance Markets, 1992-1997	2,500	4,000
IT Customer Services Satisfaction Analysis			
CEUL2	Large Systems	3,000	5,000
CEUM2	Midrange Systems	3,000	5,000
CEUS2	PCs/Workstations	3,000	5,000
CETS2	IT Customer Services Trends and Issues	3,000	5,000
CEQSR	Service Update	2,000	4,000
CECSP	Research Bulletins	NC	NA
1991 REPORTS			
CESW1	Software Support Issues in Customer Services	1,500	3,000
CECS1	VAR Markets & Support Issues in Customer Services	1,500	3,000
CEES1	Environmental Services Opportunities for Customer Services Vendors	1,500	3,000
CESM1	Customer Services Market Analysis Report	1,500	3,000
CEIM1	Independence Maintenance	1,500	3,000
CEISF	User Satisfaction - Large	1,500	3,000
	User Satisfaction - Medium	1,500	3,000
	User Satisfaction - P/C, W/S	1,500	3,000
CETP1	User Issues		
CEUS1	User Issues - Large	1,500	3,000
CEUM1	User Issues - Medium	1,500	3,000
CEUP1	User Issues - P/C, W/S	1,500	3,000
CESO1	Systems Outsourcing Opportunities	1,500	3,000

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Systems Integration Program—Europe
Pricing

1. Full SESIP Program - $19,000 (Based on $2.00 per Pound Sterling)

Component	Wholesale ($)	Retail ($)
Imapct of Downsizing on SI	2,000	3,000
SI Opportunities inRe-engineering	2,000	3,000
Methods for Successful SI Projects	2,000	3,000
Systems Integration Market, 1992-1997	3,500	5,500
SI Vendor Analysis	3,500	5,500
Research Bulletins	NC	NA
Hotline	1,500	2,000
Client Meetings	NC	NA
Annual Presentation	1,600	3,000
TOTAL	16,100	25,000

PROGRAM PRICING

- Minimum SESIP subscription to qualify for Wholesale Component prices is $15,000
 Full renewal price is $19,000

- Added Site Subscriptions:
 - $6,400 (New client)
 - $6,400 (Renewal Client)

- Extra copies - $790 per report

- *New Subscribers* - All new clients to receive prior year's *Market Analysis Report* with subscription.

- All other reports available to new subscribers at wholesale prices.

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2. Report Pricing

CODE	Component	Wholesale ($)	Retail ($)
1992 REPORTS			
SEIN2	Imapct of Downsizing on SI	2,000	3,000
SEIC2	SI Opportunities inRe-engineering	2,000	3,000
SEIV2	Methods for Successful SI Projects	2,000	3,000
SEIM2	Systems Integration Market, 1992-1997	3,500	5,500
SEVP2	SI Vendor Analysis	3,500	5,500
SESIP	Research Bulletins	NC	NA
1991 REPORTS			
SEIM1	Systems Integration Market Analysis	1,500	3,000
SEIV1	SI Vendor Issues	1,500	3,000
SEIC1	W.E. SI User Issues	1,500	3,000
SEIS1	Imaging Opportunities—W.E. SI	1,500	3,000

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Outsourcing Information Systems Program—Europe Pricing

1. Full OEOSP Program - $19,000 (Based on$2.00 per Pound Sterling)

Component	Wholesale ($)	Retail ($)
Outsourcing Systems Operations	1,500	3,000
Outsourcing Netwrok Management and Operations	1,500	3,000
Outsourcing Desktop Services	1,500	3,000
Outsourcing Applications Management	1,500	3,000
Information Systems Outsourcing Market Opportunities 1992-1997	3,500	5,500
Information Systems Outsourcing Competitive Analysis	3,500	5,500
Research Bulletins	NC	NA
Hotline	1,500	2,000
Client Meetings	NC	NA
Annual Presentation	1,600	3,000
TOTAL	16,100	28,000

PROGRAM PRICING

- Minimum OEOSP subscription to qualify for Wholesale Component prices is $15,000 Full renewal is $19,000

- Added Site Subscriptions:
 - $6,400 (New client)
 - $6,400 (Renewal Client)

- Extra copies - $790 per report

- *New Subscribers* - All new clients to receive prior year's *Market Analysis Report* with subscription.

- All other reports available to new subscribers at wholesale prices.

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2. Report Pricing

CODE	Component	Wholesale ($)	Retail ($)
1992 REPORTS			
OEOS2	Outsourcing Systems Operations	1,500	3,000
OECS2	Outsourcing Network Management and Operations	1,500	3,000
OEDT2	Outsourcing Desktop Services	1,500	3,000
OEAM2	Outsourcing Applications Management	1,500	3,000
OEMF2	Information Systems Outsourcing Market Opportunities 1992-1997	3,500	5,500
OEVP2	Information Systems Outsourcing Competitive Analysis	3,500	5,500
OEOSP	Research Bulletins	NC	NA
1991 REPORTS			
SESM1	Systems Operations Market—W.E. 1991-1996	1,500	3,000
SESV1	Profitability Challenges SO W.E.	1,500	3,000
SESC1	User Attitudes to Outsourcing W.E.	1,500	3,000
SENM1	Network Management as an SO Outsourcing Opportunity	1,500	3,000

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Network Management Services Program—Europe Pricing

1. Full NENSP Program - $31,000 (Based on $2.00 per Pound Sterling)

Component	Wholesale ($)	Retail ($)
Network Services Market	5,000	6,000
Network Services Competitive analysis	5,000	6,000
Major corporate Network Management Requirements	5,000	6,000
Network Services Customer Satisfaction	5,000	6,000
End User Network Services	5,000	6,000
Research Bulletins	NC	NA
Hotline	2,000	6,000
Client Meetings	NC	NA
Annual Presentation	2,000	3,000
TOTAL	29,000	39,000

PROGRAM PRICING

- Minimum NENSP subscription to qualify for Wholesale Component prices is $15,000 Full renewal price is $31,000

- Added Site Subscriptions:
 - $10,000 (New client)
 - $10,000 (Renewal Client)

- Extra copies - $790 per report

- *New Subscribers* - All new clients to receive prior year's *Market Analysis Report* with subscription.

- All other reports available to new subscribers at wholesale prices.

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2. Report Pricing

CODE	Component	Wholesale ($)	Retail ($)
1992 REPORTS			
NENS2	Network Services Market	5,000	6,000
NEVR2	Network Services Competitive analysis	5,000	6,000
NECN2	Major corporate Network Management Requirements	5,000	6,000
NECS2	Network Services Customer Satisfaction	5,000	6,000
NEEU2	End User Network Services	5,000	6,000
NENSP	Research Bulletins	NC	NA
1991 REPORTS			
NETO1	Opportunities in ISDN and Other Emerging Technologies—Western Europe, 1991-1996	1,500	3,000
NEIS1	User Issues in Network Services—Western Europe 1991-1996	1,500	3,000
NEFN1	Financial Network Services—Western Europe, 1991-1996	1,500	3,000
NEED1	The Western European EDI Market, 1992-1996	1,500	3,000
NENS1	The Network Services Market—Western Europe, 1992-1996	1,500	3,000

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Torrey
Laura
John McGilvray
Terye
Nancy
Mark
Chase
Paul
Denny
Glenna

MEMORANDUM

DATE: August 11, 1992

TO: INPUT Sales/Marketing and Research Personnel

FROM: Chris Smith

SUBJECT: 1992 Price Schedule

CC: Andrea, Sheila, Peter Lines, Pete, Pat

Although changes are being made to the programs that may effect our fees, attached is a fee schedule that should be implemented until further notice.

If you have any questions, please direct them to me.

a:cs2:92PRICG7

INPUT PRICE LIST

Effective August 3, 1992

I. INPUT PROGRAM PRICES (Described in marketing literature)

Full MAP (Including Issue Reports)	$35,000
MAP delivery modes only	17,500
MAP market sectors only	17,500
Systems Integration	17,500
Systems Operations (Outsourcing)	17,500
EDI/Electronic Commerce	12,500
Vendor Analysis Program	12,500
Downsizing	12,500
PAR Program (U.S. Federal Government)	*15,000
MAR Program (U.S. Federal Government)	*15,000

*A separate price schedule based on unbundled services is being developed.

All programs include two sets of deliverables. Second site at 50% of full fee.

II. INPUT FEES FOR INDIVIDUAL DELIVERABLES

Note: These are list fees per report. Discounts are available by committing to the levels outlined in Section III, "Client Customized Programs". Without a commitment to these levels, no discounts are offered.

Also, for purposes of report sales by direct mail, all reports should be offered at the fee plus 20%, with a 20% discount if purchased within a certain time frame, e.g., the report *Case Studies in Downsizing* should be listed in the direct mail brochure for $3,000 with a discount of 20% if ordered within 30 or 45 days.

A. 1992 - 1997 Market Forecasts and Analysis (each)

1.	**Delivery Mode Market Forecast and Analysis Reports** from the U.S. Market Analysis Program (MAP) (Processing Services, Network Services, Professional Services, Applications Services/Turnkey Systems, Systems Software, Equipment Services)	$3,000
2.	**Delivery Mode Market Overviews** from the U.S. Market Analysis Program (MAP) (Systems Integration and Systems Operations)	$1,500
3.	**Electronic Data Interchange Market Forecast and Analysis** from the U.S. EDI Program	$3,000
4.	**Worldwide Information Services Market Forecast and Analysis**	$6,000
5.	**Canadian Market Forecast and Analysis**	$6,000
6.	**Systems Integration Forecast and Trends** from the Systems Integration Program	$3,500

7. **Systems Operations Forecast and Trends** — $3,500
from the Systems Outsourcing Program

8. **U.S. Information Services Forecast Compendium** — $4,500
from the U.S. Market Analysis Program

(Available only to full Market Analysis Program clients)

9. **Information Services Market Forecast Book and Disk** — $3,500
from the U.S. Market Analysis Program

(Available only to full Market Analysis Program clients)

10. **U.S. Federal Systems and Services Market** — $3,000
from the U.S. Federal Market Analysis Program

B. 1992 - 1997 Industry Sector and Vertical Industry Forecasts and Analysis (each)

1. **Industry Sector Forecasts and Analysis** — $1,500
from the U.S. Market Analysis Program

(Discrete Manufacturing, Process Manufacturing, Transportation Services, Telecommunications, Utilities, Retail Distribution, Whole Distribution, Banking and Finance, Insurance, Health Services, Education, Business Services, Federal Government, State and Local Government, Miscellaneous Industries)

2. **Electronic Data Interchange Vertical Market Analysis** — $1,000
from the EDI Program

(Media, Grocery, Trade and Transportation, Apparel, Health Care, U.S. Federal Government, Travel and Tourism, Finance and Insurance)

3. **Information Services Cross Industry Reports** — $3,500
from the Market Analysis Program

(Accounting, Education and Training, Engineering and Scientific, Human Resources, Office Systems, Planning and Analysis, and Others)

C. Strategic Market Perspective Reports (each)* $2,500

U.S. Market Analysis Program (Issue Reports)

- Client Server Applications
- Pricing Professional Services
- Impact of Outsourcing on Professional Services
- Pricing and Marketing Software Products
- Will CASE Take Off Again?

U.S. Information Systems Downsizing Program

- Systems Architecture for Downsizing
- CASE Studies in Downsizing
- Impacts of Downsizing on IT Vendors
- Data Quality and Security in Downsized Environments
- Methodologies for IT Downsizing
- Putting Downsizing in Perspective
- Open Systems Strategies

U.S. Systems Integration Program

- Impact of Downsizing on Systems Integration
- Systems Integration Opportunities in Re-engineering
- Methods for Successful SI Projects
- Impact of Outsourcing on SI
- Networking Systems Integration Opportunities

U.S. Systems Operations (Outsourcing) Program

- Strategic Assessment of IS Outsourcing in 1992
- Interaction of Downsizing with Outsourcing
- Methods of Approaching IS Outsourcing
- Outsourcing of Network Management and Operations
- Outsourcing of Desktop Services
- Outsourcing Applications Management

U.S. Electronic Data Interchange Program

- International EDI Markets
- Electronic Commerce: Comprehensive Market Assessment

D. U.S. Federal Market Analysis Program Reports (each) (MARs) — $1,750

- Federal Outsourcing Market
- Federal Telecommunications Market
- Federal Computer Security Market
- Federal Systems Integration Market
- Opportunities for Downsizing in Federal Information Systems Market
- IT Buying Trends: DoD/NASA/Civilian Agencies
- Agency Recompete Practices in SETA and Systems Operations Contracts
- Agency Pricing Practices in Professional Services Contracts
- Federal CIM Information Services Market
- High Performance Computing in the Federal Market

* The Strategic Market Perspective Reports (formerly called "issue reports") are proposed within each program and not committed.

E. Vendor Profiles and Competitive Analysis Reports

1. **INPUT Vendor Analysis Program** — $12,500
 300+ profiles of U.S. IS Vendors and access to 3000+ files

2. **Client Customized Vendor Analysis Program** — $3,500
 up to 20 vendor profiles selected by client

3. **EDI/Electronic Commerce Vendor Profiles and Analysis** — $3,500

4. **Systems Integration Competitive Profiles and Analysis** — $3,500

5. **IS Outsourcing Competitive Profiles and Analysis** — $3,500

E. Newsletter Services

The EDI Reporter — $350

F. Custom Consulting and Conferences

1. **Custom Consulting Rates, per day:**

• Research Assistants	$800
• Consultants	$1,600
• Senior Consultants	$2,000
• Vice Presidents	$2,500

2. **INPUT Conferences per seat** — $500

3. **On-site Conference or Presentation** (half day) — $1,500

4. **Executive Strategic Planning Sessions** (one day) — $5,000

III. Client Customized Programs and Library Pricing

By purchasing individual reports, clients can "customize" a program specific to their needs. In return, they receive discounts on reports and access to analysts via hotline, conference tickets, etc.

1. **Level 1 Commitment:** **$15,000**

- Hotline at no charge (one person)
- One day of on-site custom consulting at no charge
- Two tickets to client's choice of any INPUT conferences at no charge
- 20% discount on all reports (The $15,000 level requires the purchase of $18,750 reports at list fees.)
- Additional sites offered for 50% of full price
- Access to INPUT's research libraries

2. **Level 2 Commitment:** **$28,000**

All of the benefits of Level 1 plus...

- Hotline at no charge (two people)
- Three days custom consulting
- Four tickets to client's choice of any INPUT conferences
- 20% discount on all reports (The $28,000 level requires the purchase of $35,000 reports at list fees and/or INPUT programs.)

3. **U.S. Information Center (Library):** **$75,000**

- All INPUT U.S. Research for a single site. (1 copy of reports, 10 copies of research bulletins for distribution)
- Hotline for one person
- Second site programs including hotline for one person for 50% of the program fee
- Additional library sites at $25,000

4. **Worldwide Information Center (Library)** **$140,000**

Same as the U.S. Information Center, but includes two sites for all research and deliverables. (Limit of one European site)

- Additional library sites at $35,000

Direct Mail

P = original plan ◯ = In process
✖ = mailed N = new *=1991

DIRECT MAIL 1992—USA

	REP PUB DATE	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
MAMAP MAPF1 U.S. PROF. SERV. 12/10/91													
*MAPR1/NS1-U.S. Proc & Ntwrk Services Mkt	12/91	✖											
*MAP??-Industry Specific (Vertical) Markets MAPxx	91	✖											
*MAW91-Worldwide forecast, 1991-1996	5/92	✖											
MAIF2-US Information Services Forecast, 1991	12/91		✖										
MAPF2-Professional Services													
MAPR2-Processing Services													
MANS2-Network Services													
MASS2-Systems Software Products													
MAAS2-Applications SW Prod/Turnkey Sys													
MAICS-Client Server Applications	7/92				P →		✖						
MAIPF-Pricing Professional Services MAPF1.	7/92					P →		✖					
MAW92-Worldwide Forecast, 1992													
MAA??Industry Specific Markets													
MAABF-Banking & Finance	4/92				✖								
MAAIN-Insurance	4/92												
MAADM-Discrete Manufacturing	5/92						P						
MAAPM-Process Manufacturing	in process						P						
MAAMD-Medical/Health Services													
MAABS-Business Services													
MAARD-Retail Distribution													
MAAWD-Wholesale Distribution													
MAAED-Education													
MAAUT-Utilities													
MAATC-Telecommunications	5/92												
MAATP-Transportation													
MAASL-State & Local Government													
MAAFG-Federal Government													
MAAMI-Miscellaneous Industries													
MAACX-Cross-Industry Markets	7/92							P					
MACFC-CONFERENCE Oct 6, 7, 8													

7/10/92

P = original plan ◯ = In process
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DIRECT MAIL 1992—USA

	REP PUB DATE	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
UIISP													
*UIIS4-Putting Downsizing in Perspective	2/92	X											
*UIIS2-Open Systems Strategies	2/92	X											
*UIBOS-Buying Outside Services						P							
UIDCS-Case Studies in Downsizing			P→	X									
UIDDM-Data Qlty & Security in Downsized Env													
UIDIV-Impact of Downsizing on IT Vendors													
UIDSA-Systems Architectures for Downsizing	4/92		P→	X									
UIDMD-Methodologies for IT Downsizing								P					
EDEDI													
*EDTTR-Elec. Comm. and Transportation	12/91	X											
*EDTGR-Elec Commerce in Grocery Distribution	12/91		X		2nd								
*EDTAP-Elec Commerce in Apparel Distribution	2/92		X										
EID92-U.S. EDI Market Report, 1992-1997	in process												
EDINT-International Electronic Data Interchange													
EDCO1-EDI/Electronic Commerce Vendor Profiles													
EDCAS-Electronic Commerce Case Studies													
EDI??Electronic Commerce Sector Reports													
EDIPB-Media	5/92					P							
EDITT-Travel and Tourism								P					
EDIFI-Financial Services and Insurance													
EDIHC-Health Care													
EDLET-EDI REPORTER	Monthly	X				P							
REGON													
REGCA-California Regional													
REGMD-Midwest Regional													
REGNE-NY/New Englend Regional													
CVVAP													
CVCIF-Comp Indstry Fnncl Wtch-Q4 91	6/92		P			P							

7/10/92

P = original plan ◯ = In process
✖ = mailed N = new *=1991

DIRECT MAIL 1992—USA

	REP PUB DATE	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
FISSP													
*FISI1—Fed. SI Market, 1991-1996	12/91	✖											
*FIFP8—Fed. Prof Srvcs Market, 1991-1996	12/91	✖											
*FISR4—Fed. Software Market, 1991-1996	1/92	✖											
*FIED2—Fed. EDI Market, 1991-1996	1/92		P										
FIPAR—Fed. Procurement Analysis Report			P										
FISE2—Fed. Computer Security Market	3/92			~~P~~ →	✖								
FIOV2—CONFERENCE	6/92		~~P1~~ →		✖								
FIDOW-Opportunities for Dwnszng Fed. IS Mkt								P					
FIOUT-Fed. Outsourcing										P			
FITE2-Fed. Telecommunications	3/92			P									
FISI2-Federal Systems Integration Market												P	
FICIM-DoD's Corp Info. Management Program	3/92			~~P~~ →			✖						
FIHPC-High-Performance Comp in the Fed. Mkt	in process					P							
SISIP													
SIMA2-SI Forecast and Trends, 1992-1997								P					
SIVA2-Systems Integration Vendor Analysis													P
SIOI2-Impact of Outsourcing on SI										P			
SIRE0-SI Opportunities in Reengineering						P							
SISPM-Methods of Successful SI Projects	7/92							P					
SINO2-Network SI Opportunities												P	
SIDOW-SI Opportunites in Downsizing												P	
SICO2-CONFERENCE July 21 & 22				~~P1~~ →		~~P2~~ →	✖						
SOSOP													
*SODB1-OOutsourcing Awards	1/92				✖								
SOAS2-Strategic Assess of IT Outsourcing 1992						P							
SODN2-Interaction of Dwnszng w/Outsourcing				P									
SONM2-Outsourcing of Ntwk Mgmt & Operations					P								
SOMET-Methods of Approaching IT Outsourcing	4/92			✖									
SOAMM-Outsourcing Applications Management												P	
SODIS-Outsourcing of Desktop Services									P				
SOVA2-Outsourcing Vendor Competitive Analysis			P1					P2					P3
SOMA2-Outsourcing Markets, 1992-1997											P		
SOCO2-CONFERENCE Sept 17 & 18						P1		P2					

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Boeing Computer Services Co.
Booz, Allen & Hamilton, Inc.
Borland International
British Telecom
Broadview Associates
Bull
Cabletron Systems
CACI
CAP Gemini America
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Nippon Telegraph & Telephone
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NTT America, Inc.
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OAO Corporation
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Orkand Corporation
Pacific Telesis
Paxus Corporation
Perot Systems Corporation
Philips International BV
Power Computing Company
Price Waterhouse
Prime Computer
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Rank Xerox
RJO Enterprises, Inc.
RMS Technologies, Inc.
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Telesystemes S.A.
Telos Systems Group
Teradata
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Computer Sciences of Australia
Computer Task Group
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CTA Incorporated
Dataserv
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NTT America, Inc.
Nynex Corporation
Ogden/ERC Government Systems
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1991 SHIP SCHED

INPUT
1991 Deliverables Shipping Schedule

Market Analysis Program, 1991—Delivery Status

Market Analysis Reports, 1991-1996
(Shipped in Segments)

Title	Ship Schedule Chapters I III IV	V VI VII	II VIII	code
U.S. Applications Solutions Market	SH 7/91	SH 11/91	SH 1/92	MAASP
U.S. Systems Software Products Market	SH 7/91	SH 11/91	SH 1/92	MASSP
U.S. Professional Services Market	SH 6/91	SH 11/91	SH 1/92	MAPF1
U.S. Network Services Market	SH 7/91	SH 11/91	SH 1/92	MANS1
U.S. Processing Services Market	SH 7/91	SH 11/91	SH 1/92	MAPR1
SI/SO Market Summary	SH 12/91			MASI1
U.S. Market Forecast Book	FEBRUARY			MAIFC
Worldwide Market Forecast	MARCH			MAW91

Industry Sector Reports, 1991-1996

Title	Ship Schedule	code
Banking and Finance Sector	SH 6/91	MAPBF
Business Services Sector*	SH 1/92	MAPBS
Discrete Manufacturing Sector	SH 2/92	MAPDM
Education Sector*	SH 1/92	MAPED
Federal Government Sector	SH 12/91	MAPFG
Insurance Sector	SH 2/92	MAPIN
Medical Sector	SH 1/92	MAPMD
Miscellaneous Industries Sector*	SG 1/92	MAPMI
Process Manufacturing Sector	SH 2/92	MAPPM
Retail Distribution Sector*	SH 1/92	MAPRD
State & Local Government Sector	SH 12/91	MAPSL
Telecommunications Sector	SH 6/91	MAPTE
Transportation Sector*	SH 2/92	MAPTR
Utilities Sector	SH 1/92	MAPUT
Wholesale Distribution Sector*	SH 1/92	MAPWD

Cross Industry Reports, 1991-1996

Title	Ship Schedule	code
Accounting Sector	SH 8/91	MAPAC
Education & Training Sector*	SH 2/92	MAPET
Engineering & Scientific Sector	SH 12/91	MAPES
Human Resources Sector	SH 8/91	MAPHR
Office Systems Sector*	SH 1/92	MAPOS
Planning & Analysis Sector	SH 12/91	MAPPA
Other Sector*	SH 1/92	MAPOT

* Forecast Update

Vendor Analysis Program, 1991—Delivery Status

Title	Ship Schedule	code
Vendor Profiles	SH 1/91↔12/91	CVPRO
1991 Vendor Financial Watch	SH 9/91	WMAN4

Confidential—INPUT

Customer Services Program, 1991—Delivery Status

Title	Ship Schedule	code
U.S. Customer Services Market	SH 2/92	FCSP1
Single Point of Contact Customer Services	SH 10/91	FCSP2
Impact of New Support Technologies	SH 12/91	FCSP3
Innovative Service Offerings	SH 2/92	FCSP4
Open Systems Strategies and Issues	SH 2/92	FCSP5
Large Systems User Requirements	SH 11/91	FCNEW1
PC/Workstation User Requirements	SH 11/91	FCNEW2
Mid-Range Systems User Requirements	SH 11/91	FCNEW3

Electronic Data & Information Interchange Program, 1991—Delivery Status

Title	Ship Schedule	code
Program—1991 Binder and Vendor Profiles	SH 3 & 6/91	EDCO1
EDI Reporter International	SH 1/91↔1/92	EDLET
U.S. EDI Market, 1991-1996	SH 11/91	EDI91
EDI/EII International Markets		EDINT
Europe	SH 2/92	
Japan	MARCH	
Electronic Commerce In Healthcare	SH 7/91	EDTHC
Electronic Commerce In Grocery Industry	SH 1/92	EDTGI
Electronic Commerce In Transportation	SH 12/91	EDTTR
Electronic Commerce In Apparel	SH 2/92	EDTRE
Electronic Commerce In Federal Government	SH 2/92	EDTFG
Electronic Commerce: A New Foundation for Trade	SH 5/91	EDAD2

Information Systems Program, 1991—Delivery Status

Title	Ship Schedule	code
Buying Outside Services	MARCH	UIBOS
Putting Downsizing in Perspective	SH 2/92	UIIS4
Open Systems Strategies	SH 2/92	UIIS2
The Future of CASE, 1991-1996	SH 5/91	UIIS1
Developments in UNIX	SH 4/91	UIIS3

Systems Integration Program, 1991—Delivery Status

Title	Ship Schedule	code
Systems Mgmt Priorities & Directions	SH 10/91	SISM1
Systems Integration Market Analysis	SH 11/91	SIMA1
Systems Integration: Vendor Analysis	SH 5/91	SIVA1
Subcontracting to Client Integrators	SH 11/91	SICS1
Systems Integration Technology Directions	SH 4/91	SITD1
Systems Integration Database	???	SIDB1

Systems Operations Program, 1991—Delivery Status

Title	Ship Schedule	code
Systems Mgmt Directions & Priorities	SH 10/91	SOSM1
Systems Operations Market Analysis	SH 11/91	SOMA1
Systems Operations Vendor Analysis Profiles	SH 6/91	SOVA1
SO Buyer Values and Alternatives	SH 5/91	SOPI1
SO Database	SH 12/91	SOSDB

Federal Information Systems and Services Program, 1991—Delivery Status

Title	Ship Schedule	code
PAR Binder	SH 1/91↔12/91	FIPAR
Fed. Computer Equipment Market	SH 8/91	FICEM
Fed. Anti-Drug Program	SH 6/91	FIDRP
Fed. GIS Market	SH 6/91	FIGIS
Fed. Electronic Imaging Market	SH 10/91	FIIN6
Fed. Network Management	SH 10/91	FINWM
GSA Schedule of Practices	SH 9/91	FISCD
Uncompensated Overtime	SH 6/91	FIUOT
Fed. Professional Services Market	SH 12/91	FIFP8
Fed. Systems Integration Market	SH 12/91	FISI1
Defense Information Systems Agency Information Services Market	SH 2/92	FIDCA
Fed. Software and Related Services Market	MARCH	FISR4
Fed. Electronic Data Interchange Market	SH 2/92	FIED2
Defense Logistics Agency Information Services Mkt.	SH 1/92	FIDL2
Federal 8(A) Program	SH 1/92	FI8AP
NASA Information Systems Market	SH 1/92	FINA2

Market Analysis Program—Europe, 1991—Delivery Status

Title	Ship Schedule	code
W. Euro. Software & Services Market, 1991-1996—		
Banking & Finance	SH 11/91	MEIB1
Process Manufacturing	SH 11/91	MEIP1
Discrete Manufacturing	SH 6/91	MEID1
Insurance	SH 10/91	MEII1
Distribution	SH 1/92	MEIR1
Processing Services Market, W. Euro.	SH 12/91	MEPR1
Professional Services Market, W. Euro.	SH 11/91	MEPS1
Applications Solutions Opportunities, W. Euro.	SH 11/91	MEAS1
The Impact of UNIX on W.Euro. Software and Services	SH 7/91	MEUM1
Opportunities for IS Training in W. Euro.	SH 11/91	MEET1
Operational Software Support and Maint. Opportunities	SH 5/91	MESM1
Market Forecast Overview	SH 11/91	MEMO1
Systems Software Products Market	SH 12/91	MEYS1
Collaboration and M.A. Issues	SH 1/92	MECO1

Vendor Analysis Program—Europe, 1991—Delivery Status

Title	Ship Schedule	code
Vendor Profiles	SH 1/91↔12/91	VEPRO

Customer Services Program—Europe, 1991—Delivery Status

Title	Ship Schedule	code
VAR Mkt & Support Issues in W.E. Customer Svcs.	SH 9/91	CECS1
Environmental Svcs Opportunities in W.E. Cust. Svc.	SH 9/91	CEES1
Independent Maintenance Market	SH 11/91	CEIM1
Service Update—Newsletter	SH 1/91↔1/92	CEQSR
Market Analysis & Forecast	SH 1/92	CESM1
Systems Software Support Issues in W. Euro.	SH 10/91	CESW1
User Issues and Trends	SH 2/92	CETP1
User Satisfaction Large Systems	SH 12/91	CEUS1
User Satisfaction Medium Systems	SH 12/91	CEUM1
User Satisfaction Small Systems	SH 12/91	CEUP1
Systems Operations for Customer Services Vendors	SH 1/92	CESO1

Network Services Program—Europe, 1991—Delivery Status

Title	Ship Schedule	code
Opportunities in ISDN & Other Emerging Technologies	SH 9/91	NETO1
User Issues in Network Services, W. Euro.	SH 7/91	NEIS1
Network Services Market	SH 12/91	NENS1
W. Euro. EDI Developments	SH 1/92	NEED1
Financial Network Services	SH 12/91	NEFN1

Systems Management Program—Europe, 1991—Delivery Status

Title	Ship Schedule	code
Systems Integration Market, W.E.	SH 12/91	SEIM1
Vendor Issues in Systems Integration, W. Euro.	SH 7/91	SEIV1
W. Euro. Systems Integration User Issues	SH 11/91	SECI1
Imaging Opportunities in W.E. SI Markets	SH 1/92	SEIS1
Systems Operations Market ,W.E.	SH 12/91	SESM1
Vendor Issues in Systems Operations, W. Euro.	SH 1/92	SESVI
W. Euro. Systems Operations User Issues	SH 1/92	SESC1
Network Mgmt as a SO Outsourcing Opportunity	SH 5/91	SENM1

INPUT
1991 Deliverables Shipping Schedule

Market Analysis Program, 1991—Delivery Status

Market Analysis Reports, 1991-1996
(Shipped in Segments)

Title	Ship Schedule Chapters I III IV	Chapters V VI VII	Chapters II VIII	code
U.S. Applications Solutions Market	SH 7/91	SH 11/91	SH 1/92	MAASP
U.S. Systems Software Products Market	SH 7/91	SH 11/91	SH 1/92	MASSP
U.S. Professional Services Market	SH 6/91	SH 11/91	SH 1/92	MAPF1
U.S. Network Services Market	SH 7/91	SH 11/91	SH 1/92	MANS1
U.S. Processing Services Market	SH 7/91	SH 11/91	SH 1/92	MAPR1
SI/SO Market Summary		SH 12/91		MASI1
U.S. Market Forecast Book		FEBRUARY		MAIFC
Worldwide Market Forecast		MARCH		MAW91

Industry Sector Reports, 1991-1996

Title	Ship Schedule	code
Banking and Finance Sector	SH 6/91	MAPBF
Business Services Sector*	SH 1/92	MAPBS
Discrete Manufacturing Sector	SH 2/92	MAPDM
Education Sector*	SH 1/92	MAPED
Federal Government Sector	SH 12/91	MAPFG
Insurance Sector	SH 2/92	MAPIN
Medical Sector	SH 1/92	MAPMD
Miscellaneous Industries Sector*	SG 1/92	MAPMI
Process Manufacturing Sector	SH 2/92	MAPPM
Retail Distribution Sector*	SH 1/92	MAPRD
State & Local Government Sector	SH 12/91	MAPSL
Telecommunications Sector	SH 6/91	MAPTE
Transportation Sector*	SH 2/92	MAPTR
Utilities Sector	SH 1/92	MAPUT
Wholesale Distribution Sector*	SH 1/92	MAPWD

Cross Industry Reports, 1991-1996

Title	Ship Schedule	code
Accounting Sector	SH 8/91	MAPAC
Education & Training Sector*	SH 2/92	MAPET
Engineering & Scientific Sector	SH 12/91	MAPES
Human Resources Sector	SH 8/91	MAPHR
Office Systems Sector*	SH 1/92	MAPOS
Planning & Analysis Sector	SH 12/91	MAPPA
Other Sector*	SH 1/92	MAPOT

* Forecast Update

Vendor Analysis Program, 1991—Delivery Status

Title	Ship Schedule	code
Vendor Profiles	SH 1/91↔12/91	CVPRO
1991 Vendor Financial Watch	SH 9/91	WMAN4

Customer Services Program, 1991—Delivery Status

Title	Ship Schedule	code
U.S. Customer Services Market	SH 2/92	FCSP1
Single Point of Contact Customer Services	SH 10/91	FCSP2
Impact of New Support Technologies	SH 12/91	FCSP3
Innovative Service Offerings	SH 2/92	FCSP4
Open Systems Strategies and Issues	SH 2/92	FCSP5
Large Systems User Requirements	SH 11/91	FCNEW1
PC/Workstation User Requirements	SH 11/91	FCNEW2
Mid-Range Systems User Requirements	SH 11/91	FCNEW3

Electronic Data & Information Interchange Program, 1991—Delivery Status

Title	Ship Schedule	code
Program—1991 Binder and Vendor Profiles	SH 3 & 6/91	EDCO1
EDI Reporter International	SH 1/91↔1/92	EDLET
U.S. EDI Market, 1991-1996	SH 11/91	EDI91
EDI/EII International Markets		EDINT
Europe	SH 2/92	
Japan	MARCH	
Electronic Commerce In Healthcare	SH 7/91	EDTHC
Electronic Commerce In Grocery Industry	SH 1/92	EDTGI
Electronic Commerce In Transportation	SH 12/91	EDTTR
Electronic Commerce In Apparel	SH 2/92	EDTRE
Electronic Commerce In Federal Government	SH 2/92	EDTFG
Electronic Commerce: A New Foundation for Trade	SH 5/91	EDAD2

Information Systems Program, 1991—Delivery Status

Title	Ship Schedule	code
Buying Outside Services	MARCH	UIBOS
Putting Downsizing in Perspective	SH 2/92	UIIS4
Open Systems Strategies	SH 2/92	UIIS2
The Future of CASE, 1991-1996	SH 5/91	UIIS1
Developments in UNIX	SH 4/91	UIIS3

1991 Deliverables Shipping Schedule

Systems Integration Program, 1991—Delivery Status

Title	Ship Schedule	code
Systems Mgmt Priorities & Directions	SH 10/91	SISM1
Systems Integration Market Analysis	SH 11/91	SIMA1
Systems Integration: Vendor Analysis	SH 5/91	SIVA1
Subcontracting to Client Integrators	SH 11/91	SICS1
Systems Integration Technology Directions	SH 4/91	SITD1
Systems Integration Database	???	SIDB1

Systems Operations Program, 1991—Delivery Status

Title	Ship Schedule	code
Systems Mgmt Directions & Priorities	SH 10/91	SOSM1
Systems Operations Market Analysis	SH 11/91	SOMA1
Systems Operations Vendor Analysis Profiles	SH 6/91	SOVA1
SO Buyer Values and Alternatives	SH 5/91	SOPI1
SO Database	SH 12/91	SOSDB

Federal Information Systems and Services Program, 1991—Delivery Status

Title	Ship Schedule	code
PAR Binder	SH 1/91↔12/91	FIPAR
Fed. Computer Equipment Market	SH 8/91	FICEM
Fed. Anti-Drug Program	SH 6/91	FIDRP
Fed. GIS Market	SH 6/91	FIGIS
Fed. Electronic Imaging Market	SH 10/91	FIIN6
Fed. Network Management	SH 10/91	FINWM
GSA Schedule of Practices	SH 9/91	FISCD
Uncompensated Overtime	SH 6/91	FIUOT
Fed. Professional Services Market	SH 12/91	FIFP8
Fed. Systems Integration Market	SH 12/91	FISI1
Defense Information Systems Agency Information Services Market	SH 2/92	FIDCA
Fed. Software and Related Services Market	MARCH	FISR4
Fed. Electronic Data Interchange Market	SH 2/92	FIED2
Defense Logistics Agency Information Services Mkt.	SH 1/92	FIDL2
Federal 8(A) Program	SH 1/92	FI8AP
NASA Information Systems Market	SH 1/92	FINA2

Market Analysis Program—Europe, 1991—Delivery Status

Title	Ship Schedule	code
W. Euro. Software & Services Market, 1991-1996—		
Banking & Finance	SH 11/91	MEIB1
Process Manufacturing	SH 11/91	MEIP1
Discrete Manufacturing	SH 6/91	MEID1
Insurance	SH 10/91	MEII1
Distribution	SH 1/92	MEIR1
Processing Services Market, W. Euro.	SH 12/91	MEPR1
Professional Services Market, W. Euro.	SH 11/91	MEPS1
Applications Solutions Opportunities, W. Euro.	SH 11/91	MEAS1
The Impact of UNIX on W.Euro. Software and Services	SH 7/91	MEUM1
Opportunities for IS Training in W. Euro.	SH 11/91	MEET1
Operational Software Support and Maint. Opportunities	SH 5/91	MESM1
Market Forecast Overview	SH 11/91	MEMO1
Systems Software Products Market	SH 12/91	MEYS1
Collaboration and M.A. Issues	SH 1/92	MECO1

Vendor Analysis Program—Europe, 1991—Delivery Status

Title	Ship Schedule	code
Vendor Profiles	SH 1/91↔12/91	VEPRO

Customer Services Program—Europe, 1991—Delivery Status

Title	Ship Schedule	code
VAR Mkt & Support Issues in W.E. Customer Svcs.	SH 9/91	CECS1
Environmental Svcs Opportunities in W.E. Cust. Svc.	SH 9/91	CEES1
Independent Maintenance Market	SH 11/91	CEIM1
Service Update—Newsletter	SH 1/91↔1/92	CEQSR
Market Analysis & Forecast	SH 1/92	CESM1
Systems Software Support Issues in W. Euro.	SH 10/91	CESW1
User Issues and Trends	SH 2/92	CETP1
User Satisfaction Large Systems	SH 12/91	CEUS1
User Satisfaction Medium Systems	SH 12/91	CEUM1
User Satisfaction Small Systems	SH 12/91	CEUP1
Systems Operations for Customer Services Vendors	SH 1/92	CESO1

Network Services Program—Europe, 1991—Delivery Status

Title	Ship Schedule	code
Opportunities in ISDN & Other Emerging Technologies	SH 9/91	NETO1
User Issues in Network Services, W. Euro.	SH 7/91	NEIS1
Network Services Market	SH 12/91	NENS1
W. Euro. EDI Developments	SH 1/92	NEED1
Financial Network Services	SH 12/91	NEFN1

Systems Management Program—Europe, 1991—Delivery Status

Title	Ship Schedule	code
Systems Integration Market, W.E.	SH 12/91	SEIM1
Vendor Issues in Systems Integration, W. Euro.	SH 7/91	SEIV1
W. Euro. Systems Integration User Issues	SH 11/91	SECI1
Imaging Opportunities in W.E. SI Markets	SH 1/92	SEIS1
Systems Operations Market ,W.E.	SH 12/91	SESM1
Vendor Issues in Systems Operations, W. Euro.	SH 1/92	SESV1
W. Euro. Systems Operations User Issues	SH 1/92	SESC1
Network Mgmt as a SO Outsourcing Opportunity	SH 5/91	SENM1

1992 SHIP SCHED

1992 PROGRAM SHIPPING SCHEDULE

- estimated -

U.S. Information Services Market Analysis Program

CODE	Title	Ship Schedule/*Month Shipped*
MAERB	Research Bulletins	*Monthly*
MAMAP	Program Introduction	*May*
MAFC1	Definition of Terms	*May*
U.S. MARKET REPORTS, 1992-1997		
MAPR2	Processing Services Market	Quarter 3
MAPF2	Professional Services Market	Quarter 3
MANS2	Network Services Market	Quarter 4
MAAS2	Application SW Products/Turnkey Systems Market	Quarter 4
MASS2	Systems Software Products Market	Quarter 4
MAES2	Equipment Services Market	Quarter 4
MASSM	SI and SO Markets Overview	Quarter 4
MAIF1	Information Services Industry Forecast Book/Disk	Quarter 4
ISSUE REPORTS		
MAICS	Client/Server Applications and Markets	*June*
MAIPF	Pricing and Marketing Professional Services in the 1990s	Quarter 3
MAIR4	Impact of Outsourcing on Professional Services Market	Quarter 4
MAIR3	Pricing and Marketing Software Products in the 1990s	Quarter 4
MAIR5	Will CASE Rise Again?	Quarter 4
MAW92	Worldwide Information Services Market Report	Quarter 4
INDUSTRY SECTOR REPORTS, 1992-1997		
MAABF	Banking/Finance Industry	*April*
MAADM	Discrete Manufacturing Industry	*May*
MAAIN	Insurance Industry	*May*
MAATC	Telecommunications Industry	*May*
MAAPM	Process Manufacturing Industry	*July*
MAATP	Transportation Industry	Quarter 3
MAASL	State & Local Government Industry	Quarter 3
MAAUT	Utilities Industry	Quarter 3
MAAMD	Health Services	Quarter 3
MAABS	Business Services Industry	Quarter 4
MAAED	Education Industry	Quarter 4
MAAFG	Federal Government. Industry	Quarter 4
MAAMI	Miscellaneous Industries	Quarter 4
MAARD	Retail Distribution Industry	Quarter 4
MAAWD	Wholesale Distribution Industry	Quarter 4
CROSS-INDUSTRY SECTORS REPORT, 1992-1997 (one report)		*July*
MAACA	Accounting	
MAACE	Education & Training	
MAACS	Engineering & Scientific	
MAACH	Human Resources	
MAACO	Office Systems	
MAACM	Other (Sales & Marketing)	
MAACP	Planning & Analysis	

U.S. Information Services Vendor Analysis Program

CODE	Title	Ship Schedule/Month Shipped
CVPRO	Vendor Profiles	*Monthly*
CVCIF	U.S. Computer Financial Watch-Q2, 1991	*April*
CVCIF	U.S. Computer Financial Watch-End 1991	*June*
CVCIF	U.S. Computer Financial Watch-Q3 1992	Quarter 3
CVCIF	U.S. Computer Financial Watch-Q4 1992	Quarter 4

EDI and Electronic Commerce Program

CODE	Title	Ship Schedule/*Month Shipped*
EDLET	EDI Reporter Newsletter	*Monthly*
EDIPB	Electronic Commerce in the Media Industry	*May*
EDI92	U.S. Electronic Data Interchange Market Report, 1992-1997	Quarter 3
EDCO1	EDI/Electronic Commerce Vendor Profiles and Analysis	Quarter 3
EDITT	Electronic Commerce in Travel and Tourism	Quarter 3
EDINT	International EDI Markets	Quarter 4
EDCAS	Electronic Commerce: Comprehensive Market Assessment	Quarter 4
EDIHC	Electronic Commerce in U.S. Health Care	Quarter 4
EDIFI	Electronic Commerce Finance and Insurance	Quarter 4

Downsizing Information Systems Program

CODE	Title	Ship Schedule/*Month Shipped*
UIDSA	Systems Architecture for Downsizing	*May*
UIDCS	Case Studies in Downsizing	Quarter 3
UIDDM	Data Quality and Security in Downsized Environments	Quarter 3
UIDMD	Methodologies for IT Downsizing	Quarter 4
UIBOS	Buying Outside Services	Quarter 4
UIDIV	Impacts of Downsizing on IT Vendors	Quarter 4

Systems Integration Program

CODE	Title	Ship Schedule/*Month Shipped*
SIERB	Research Bulletins	*Monthly*
SIVA2	SI Competitive Analysis	*Quarterly*
SISPM	Methods for Successful SI Projects	*July*
SIREO	SI Opportunities in Re-Engineering	Quarter 3
SIMA2	SI Trends and Forecast, 1992-1997	Quarter 3
SIDOW	Impact of Downsizing on SI	Quarter 4
SIOI2	Impact of Outsourcing on SI	Quarter 4
SINO2	Networking SI Opportunities	Quarter 4

Outsourcing of Information Systems Program

CODE	Title	Ship Schedule/*Month Shipped*
SOERB	Research Bulletins	*Monthly*
SOVA2	Information systems Outsourcing Competitive Analysis	*Quarterly*
SOMET	Methods of Approaching IS Outsourcing	*May*
SONM2	Outsourcing of Network Management and Operations	*July*
SOAS2	Strategic Assessment of IS Outsourcing in 1992	Quarter 3
SODN2	Interaction of Downsizing with Outsourcing	Quarter 3
SODIS	Outsourcing of Desktop Services	Quarter 3
SOAMM	Outsourcing Applications Management	Quarter 4
SOMA2	Information Systems Outsourcing Market Opportunities, 1992-1997	Quarter 4

Federal Information Technology Market Program

CODE	Title	Ship Schedule/*Month Shipped*
FIERB	Research Bulletins	*Monthly*
FEDERAL MARKET REPORTS		
FSTE2	Federal Telecommunications Market	*April*
FSSE2	Federal Computer Security Market	*April*
FSSSM	Federal Systems and Services Market, 1992-1997	Quarter 3
FSOUT	Federal Outsourcing Market	Quarter 4
FSSI2	Federal Systems Integration Market	Quarter 4
AGENCY & ISSUE REPORTS		
FSCIM	Federal CIM Information Services Market	*March*
FSHPC	High-Performance Computing in the Federal Market	Quarter 3
FSDOW	Opportunities for Downsizing in Federal Information Systems Market	Quarter 4
FSDNC	IT Buying Trends: DoD/NASA/Civilian Agencies	Quarter 4
FSARP	Agency Recompete Practices in SETA and Systems Operations Contracts	Quarter 4
FSPSC	Agency Pricing Practices in Professional Services Contracts	Quarter 4

Federal Information Technology Procurement Program

CODE	Title	Ship Schedule/*Month Shipped*
FIPAR	Procurement Analysis Reports	*Bi-weekly*
	Automated PAR	*Monthly*

Information Services Program—Europe

CODE	Title	Ship Schedule/*Month Shipped*
IEERB	Research Bulletins	*Monthly*
IEEA2	Definitions & Economic Assumptions	
MARKET REPORTS		
	Software and Services Market	
IEIB2	Banking & Finance	Quarter 3
IEII2	Insurance	Quarter 3
IEID2	Discrete Manufacturing	Quarter 3
IEIP2	Process Manufacturing	Quarter 3
IEIR2	Retail & Wholesale Distribution	Quarter 3
IEMO2	Forecast Database *(draft)*	Quarter 3
IEIT2	Software and Services Opportunities in Transportation	Quarter 4
IECM2	Information Services Industry MarketAnalysis & Forecast Database	Quarter 4
IEIG2	Software and Services Opportunities in National Governments	Quarter 4
ISSUE REPORTS		
IEVP2	Leading Vendor Competitor Analysis	*Quarterly*
IERE2	Software Re-engineering in Europe	*June*
IEEA2	IT Spending Patterns—Europe, 1992-1997	Quarter 3
IEOS2	IT Services—Growth or Decline?	Quarter 4

Customer Services Program—Europe

CODE	Title	Ship Schedule/*Month Shipped*
CEERB	Research Bulletins	*Monthly*
CEQSR	Service Update Newsletter	*Monthly*
CEDT2	Impact of Downsizing on Customer Services Organisations	*June*
CEVS2	Professional Services Strategies	Quarter 3
CERS2	Open Systems Services	Quarter 3
CESM2	IT Customer Services Market, 1992-1997	Quarter 3
CEIM2	European Multivendor Maintenance Markets, 1992-1997	Quarter 3
	IT Customer Services Satisfaction Analysis	
CEUL2	Large Systems	Quarter 4
CEUM2	Midrange Systems	Quarter 4
CEUS2	PCs/Workstations	Quarter 4
CETS2	IT Customer Services Trends and Issues	Quarter 4

Systems Integration Program—Europe

CODE	Title	Ship Schedule/*Month Shipped*
SEERB	Research Bulletins	*Quarterly*
SEIN2	Impact of Downsizing on SI	Quarter 3
SEIV2	Methods for Successful SI Projects	Quarter 3
SEIC2	SI Opportunities in Re-engineering	Quarter 4
SEIM2	Systems Integration Markets, 1992-1997	Quarter 4
SEVR2	SI Vendor Analysis	Quarter 4

Outsourcing Information Systems Program—Europe

CODE	Title	Ship Schedule/*Month Shipped*
OEERB	Research Bulletins	*Quarterly*
OEDT2	Outsourcing Desktop Services	*June*
OESO2	Outsourcing Systems Operations	Quarter 3
OECS2	Outsourcing Network Management and Operations	Quarter 4
OEAM2	Outsourcing Applications Management	Quarter 4
OEMF2	Information Systems Outsourcing Market Opportunities, 1992-1997	Quarter 4
OEVP2	Information Systems Outsourcing Competitive Analysis	Quarter 4

Network Management Services Program—Europe

CODE	Title	Ship Schedule/*Month Shipped*
NENS2	Network Services Market Analysis, 1992-1997	Quarter 4
NEVR2	Network Services competitive Analysis	Quarter 4
NECN2	Major Corporate Network Management Requirements	Quarter 4
NECS2	Network Services Customer Satisfaction	Quarter 4
NEEU2	End User Network Services	Quarter 4

1992 PROGRAM SHIPPING SCHEDULE

- estimated -

U.S. Information Services Market Analysis Program

CODE	Title	Ship Schedule/*Month Shipped*
MAERB	Research Bulletins	*Monthly*
MAMAP	Program Introduction	*May*
MAFC1	Definition of Terms	*May*
U.S. MARKET REPORTS, 1992-1997		
MAPR2	Processing Services Market	Quarter 3
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MASS2	Systems Software Products Market	Quarter 4
MAES2	Equipment Services Market	Quarter 4
MASSM	SI and SO Markets Overview	Quarter 4
MAIF1	Information Services Industry Forecast Book/Disk	Quarter 4
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MAIPF	Pricing and Marketing Professional Services in the 1990s	Quarter 3
MAIR4	Impact of Outsourcing on Professional Services Market	Quarter 4
MAIR3	Pricing and Marketing Software Products in the 1990s	Quarter 4
MAIR5	Will CASE Rise Again?	Quarter 4
MAW92	Worldwide Information Services Market Report	Quarter 4
INDUSTRY SECTOR REPORTS, 1992-1997		
MAABF	Banking/Finance Industry	*April*
MAADM	Discrete Manufacturing Industry	*May*
MAAIN	Insurance Industry	*May*
MAATC	Telecommunications Industry	*May*
MAAPM	Process Manufacturing Industry	*July*
MAATP	Transportation Industry	Quarter 3
MAASL	State & Local Government Industry	Quarter 3
MAAUT	Utilities Industry	Quarter 3
MAAMD	Health Services	Quarter 3
MAABS	Business Services Industry	Quarter 4
MAAED	Education Industry	Quarter 4
MAAFG	Federal Government. Industry	Quarter 4
MAAMI	Miscellaneous Industries	Quarter 4
MAARD	Retail Distribution Industry	Quarter 4
MAAWD	Wholesale Distribution Industry	Quarter 4
CROSS-INDUSTRY SECTORS REPORT, 1992-1997 (one report)		*July*
MAACA	Accounting	
MAACE	Education & Training	
MAACS	Engineering & Scientific	
MAACH	Human Resources	
MAACO	Office Systems	
MAACM	Other (Sales & Marketing)	
MAACP	Planning & Analysis	

U.S. Information Services Vendor Analysis Program

CODE	Title	Ship Schedule/Month Shipped
CVPRO	Vendor Profiles	*Monthly*
CVCIF	U.S. Computer Financial Watch-Q2, 1991	*April*
CVCIF	U.S. Computer Financial Watch-End 1991	*June*
CVCIF	U.S. Computer Financial Watch-Q3 1992	Quarter 3
CVCIF	U.S. Computer Financial Watch-Q4 1992	Quarter 4

EDI and Electronic Commerce Program

CODE	Title	Ship Schedule/*Month Shipped*
EDLET	EDI Reporter Newsletter	*Monthly*
EDIPB	Electronic Commerce in the Media Industry	*May*
EDI92	U.S. Electronic Data Interchange Market Report, 1992-1997	Quarter 3
EDCO1	EDI/Electronic Commerce Vendor Profiles and Analysis	Quarter 3
EDITT	Electronic Commerce in Travel and Tourism	Quarter 3
EDINT	International EDI Markets	Quarter 4
EDCAS	Electronic Commerce: Comprehensive Market Assessment	Quarter 4
EDIHC	Electronic Commerce in U.S. Health Care	Quarter 4
EDIFI	Electronic Commerce Finance and Insurance	Quarter 4

Downsizing Information Systems Program

CODE	Title	Ship Schedule/*Month Shipped*
UIDSA	Systems Architecture for Downsizing	*May*
UIDCS	Case Studies in Downsizing	Quarter 3
UIDDM	Data Quality and Security in Downsized Environments	Quarter 3
UIDMD	Methodologies for IT Downsizing	Quarter 4
UIBOS	Buying Outside Services	Quarter 4
UIDIV	Impacts of Downsizing on IT Vendors	Quarter 4

Systems Integration Program

CODE	Title	Ship Schedule/*Month Shipped*
SIERB	Research Bulletins	*Monthly*
SIVA2	SI Competitive Analysis	*Quarterly*
SISPM	Methods for Successful SI Projects	*July*
SIREO	SI Opportunities in Re-Engineering	Quarter 3
SIMA2	SI Trends and Forecast, 1992-1997	Quarter 3
SIDOW	Impact of Downsizing on SI	Quarter 4
SIOI2	Impact of Outsourcing on SI	Quarter 4
SINO2	Networking SI Opportunities	Quarter 4

Outsourcing of Information Systems Program

CODE	Title	Ship Schedule/*Month Shipped*
SOERB	Research Bulletins	*Monthly*
SOVA2	Information systems Outsourcing Competitive Analysis	*Quarterly*
SOMET	Methods of Approaching IS Outsourcing	*May*
SONM2	Outsourcing of Network Management and Operations	*July*
SOAS2	Strategic Assessment of IS Outsourcing in 1992	Quarter 3
SODN2	Interaction of Downsizing with Outsourcing	Quarter 3
SODIS	Outsourcing of Desktop Services	Quarter 3
SOAMM	Outsourcing Applications Management	Quarter 4
SOMA2	Information Systems Outsourcing Market Opportunities, 1992-1997	Quarter 4

Federal Information Technology Market Program

CODE	Title	Ship Schedule/*Month Shipped*
FIERB	Research Bulletins	*Monthly*
FEDERAL MARKET REPORTS		
FSTE2	Federal Telecommunications Market	*April*
FSSE2	Federal Computer Security Market	*April*
FSSSM	Federal Systems and Services Market, 1992-1997	Quarter 3
FSOUT	Federal Outsourcing Market	Quarter 4
FSSI2	Federal Systems Integration Market	Quarter 4
AGENCY & ISSUE REPORTS		
FSCIM	Federal CIM Information Services Market	*March*
FSHPC	High-Performance Computing in the Federal Market	Quarter 3
FSDOW	Opportunities for Downsizing in Federal Information Systems Market	Quarter 4
FSDNC	IT Buying Trends: DoD/NASA/Civilian Agencies	Quarter 4
FSARP	Agency Recompete Practices in SETA and Systems Operations Contracts	Quarter 4
FSPSC	Agency Pricing Practices in Professional Services Contracts	Quarter 4

Federal Information Technology Procurement Program

CODE	Title	Ship Schedule/*Month Shipped*
FIPAR	Procurement Analysis Reports	*Bi-weekly*
	Automated PAR	*Monthly*

Information Services Program—Europe

CODE	Title	Ship Schedule/*Month Shipped*
IEERB	Research Bulletins	*Monthly*
IEEA2	Definitions & Economic Assumptions	
MARKET REPORTS		
	Software and Services Market	
IEIB2	Banking & Finance	Quarter 3
IEII2	Insurance	Quarter 3
IEID2	Discrete Manufacturing	Quarter 3
IEIP2	Process Manufacturing	Quarter 3
IEIR2	Retail & Wholesale Distribution	Quarter 3
IEMO2	Forecast Database *(draft)*	Quarter 3
IEIT2	Software and Services Opportunities in Transportation	Quarter 4
IECM2	Information Services Industry MarketAnalysis & Forecast Database	Quarter 4
IEIG2	Software and Services Opportunities in National Governments	Quarter 4
ISSUE REPORTS		
IEVP2	Leading Vendor Competitor Analysis	*Quarterly*
IERE2	Software Re-engineering in Europe	*June*
IEEA2	IT Spending Patterns—Europe, 1992-1997	Quarter 3
IEOS2	IT Services—Growth or Decline?	Quarter 4

Customer Services Program—Europe

CODE	Title	Ship Schedule/*Month Shipped*
CEERB	Research Bulletins	*Monthly*
CEQSR	Service Update Newsletter	*Monthly*
CEDT2	Impact of Downsizing on Customer Services Organisations	*June*
CEVS2	Professional Services Strategies	Quarter 3
CERS2	Open Systems Services	Quarter 3
CESM2	IT Customer Services Market, 1992-1997	Quarter 3
CEIM2	European Multivendor Maintenance Markets, 1992-1997	Quarter 3
	IT Customer Services Satisfaction Analysis	
CEUL2	Large Systems	Quarter 4
CEUM2	Midrange Systems	Quarter 4
CEUS2	PCs/Workstations	Quarter 4
CETS2	IT Customer Services Trends and Issues	Quarter 4

Systems Integration Program—Europe

CODE	Title	Ship Schedule/*Month Shipped*
SEERB	Research Bulletins	*Quarterly*
SEIN2	Impact of Downsizing on SI	Quarter 3
SEIV2	Methods for Successful SI Projects	Quarter 3
SEIC2	SI Opportunities in Re-engineering	Quarter 4
SEIM2	Systems Integration Markets, 1992-1997	Quarter 4
SEVR2	SI Vendor Analysis	Quarter 4

Outsourcing Information Systems Program—Europe

CODE	Title	Ship Schedule/*Month Shipped*
OEERB	Research Bulletins	*Quarterly*
OEDT2	Outsourcing Desktop Services	*June*
OESO2	Outsourcing Systems Operations	Quarter 3
OECS2	Outsourcing Network Management and Operations	Quarter 4
OEAM2	Outsourcing Applications Management	Quarter 4
OEMF2	Information Systems Outsourcing Market Opportunities, 1992-1997	Quarter 4
OEVP2	Information Systems Outsourcing Competitive Analysis	Quarter 4

Network Management Services Program—Europe

CODE	Title	Ship Schedule/*Month Shipped*
NENS2	Network Services Market Analysis, 1992-1997	Quarter 4
NEVR2	Network Services competitive Analysis	Quarter 4
NECN2	Major Corporate Network Management Requirements	Quarter 4
NECS2	Network Services Customer Satisfaction	Quarter 4
NEEU2	End User Network Services	Quarter 4

1992 PROGRAM SHIPPING SCHEDULE

U.S. Information Services Market Analysis Program

CODE	Title	Ship Schedule/Month Shipped
MAERB	Research Bulletins	Monthly
MAMAP	Program Introduction	Quarter 2
MAFC1	Definition of Terms	Quarter 2
U.S. MARKET REPORTS, 1992-1997		
MAPR2	Processing Services Market	Quarter 3
MANS2	Network Services Market	Quarter 4
MAPF2	Professional Services Market	Quarter 3
MAAS2	Application SW Products/Turnkey Systems Market	Quarter 3
MASS2	Systems Software Products Market	Quarter 3
MAES2	Equipment Services Market	Quarter 4
MASSM	SI and SO Markets Overview	Quarter 4
MAIF1	Information Services Industry Forecast Book/Disk	Quarter 4
ISSUE REPORTS		
MAICS	Client/Server Applications and Markets	Quarter 2
MAIPF	Pricing and Marketing Professional Services in the 1990s	Quarter 2
MAIR4	Impact of Outsourcing on Professional Services Market	Quarter 4
MAIR3	Pricing and Marketing Software Products in the 1990s	Quarter 4
MAIR5	Will CASE Rise Again?	Quarter 3
MAW92	Worldwide Information Services Market Report	Quarter 4
INDUSTRY SECTOR REPORTS, 1992-1997		
MAABF	Banking/Finance Industry	April
MAADM	Discrete Manufacturing Industry	Quarter 2
MAAPM	Process Manufacturing Industry	Quarter 2
MAAMD	Health Services	Quarter 3
MAAIN	Insurance Industry	May
MAABS	Business Services Industry	Quarter 4
MAAED	Education Industry	Quarter 4
MAAFG	Federal Government. Industry	Quarter 4
MAAMI	Miscellaneous Industries	Quarter 4
MAARD	Retail Distribution Industry	Quarter 4
MAASL	State & Local Government Industry	Quarter 3
MAATC	Telecommunications Industry	Quarter 2
MAATP	Transportation Industry	Quarter 3
MAAUT	Utilities Industry	Quarter 3
MAAWD	Wholesale Distribution Industry	Quarter 4
CROSS-INDUSTRY SECTOR REPORTS, 1992-1997		
MAACA	Accounting	Quarter 3
MAACE	Education & Training	Quarter 3
MAACS	Engineering & Scientific	Quarter 3
MAACH	Human Resources	Quarter 3
MAACO	Office Systems	Quarter 3
MAACM	Other (Sales & Marketing)	Quarter 3
MAACP	Planning & Analysis	Quarter 3

U.S. Information Services Vendor Analysis Program

CODE	Title	Ship Schedule/Month Shipped
CVPRO	Vendor Profiles	Monthly
CVCIF	U.S. Computer Financial Watch	April

EDI and Electronic Commerce Program

CODE	Title	Ship Schedule/Month Shipped
EDI92	U.S. Electronic Data Interchange Market Report, 1992-1997	Quarter 3
EDCO1	EDI/Electronic Commerce Vendor Profiles and Analysis	Quarter 3
EDINT	International EDI Markets	Quarter 4
EDCAS	Electronic Commerce: Comprehensive Market Assessment	Quarter 4
EDIPB	Electronic Commerce in the Media Industry	Quarter 2
EDIHC	Electronic Commerce in U.S. Health Care	Quarter 4
EDITT	Electronic Commerce in Travel and Tourism	Quarter 3
EDIFI	Electronic Commerce Finance and Insurance	Quarter 4
EDLET	EDI Reporter Newsletter	Monthly

Downsizing Information Systems Program

CODE	Title	Ship Schedule/Month Shipped
UIDSA	Systems Architecture for Downsizing	May
UIDCS	Case Studies in Downsizing	Quarter 2
UIDIV	Impacts of Downsizing on IT Vendors	Quarter 4
UIDDM	Data Quality and Security in Downsized Environments	Quarter 3
UIDMD	Methodologies for IT Downsizing	Quarter 3
UIBOS	Buying Outside Services	Quarter 2

Systems Integration Program

CODE	Title	Ship Schedule/Month Shipped
SIERB	Research Bulletins	Monthly
SIDOW	Impact of Downsizing on SI	Quarter 4
SIREO	SI Opportunities in Re-engineering	Quarter 3
SISPM	Methods for Successful SI Projects	Quarter 2
SIOI2	Impact of Outsourcing on SI	Quarter 3
SINO2	Networking SI Opportunities	Quarter 4
SIMA2	SI Trends and Forecast, 1992-1997	Quarter 3
SIVA2	SI Competitive Analysis	Quarterly

Outsourcing of Information Systems Program

CODE	Title	Ship Schedule/Month Shipped
SOERB	Research Bulletins	Monthly
SOAS2	Strategic Assessment of IS Outsourcing in 1992	Quarter 2
SODN2	Interaction of Downsizing with Outsourcing	Quarter 3
SOMET	Methods of Approaching IS Outsourcing	May
SONM2	Outsourcing of Network Management and Operations	Quarter 2
SODIS	Outsourcing of Desktop Services	Quarter 3
SOAMM	Outsourcing Applications Management	Quarter 4
SOMA2	Information Systems Outsourcing Market Opportunities, 1992-1997	Quarter 4
SOVA2	Information systems Outsourcing Competitive Analysis	Quarterly

Federal Information Technology Market Program

CODE	Title	Ship Schedule/Month Shipped
FIERB	Research Bulletins	Monthly
FEDERAL MARKET REPORTS		
FSOUT	Federal Outsourcing Market	Quarter 3
FSTE2	Federal Telecommunications Market	April
FSSE2	Federal Computer Security Market	April
FSSI2	Federal Systems Integration Market	Quarter 4
FSSSM	Federal Systems and Services Market	Quarter 3
AGENCY & ISSUE REPORTS		
FSDOW	Opportunities for Downsizing in Federal Information Systems Market	Quarter 3
FSHPC	High-Performance Computing in the Federal Market	Quarter 2
FSDNC	IT Buying Trends: DoD/NASA/Civilian Agencies	Quarter 4
FSCIM	Federal CIM Information Services Market	March
FSARP	Agency Recompete Practices in SETA and Systems Operations Contracts	Quarter 3
FSPSC	Agency Pricing Practices in Professional Services Contracts	Quarter 3

Federal Information Technology Procurement Program

CODE	Title	Ship Schedule/Month Shipped
FIPAR	Procurement Analysis Reports	Bi-weekly
	Automated PAR	Monthly

Information Services Program—Europe

CODE	Title	Ship Schedule/Month Shipped
IEERB	Research Bulletins	Monthly
IEMAP	Program Introduction	
IEEA2	Definitions & Economic Assumptions	
MARKET REPORTS		
IECM2	European Market for Software and Services, 1992-1997	Quarter 4
IEMO2	Information Services Market Forecast Database	Quarter 3
IEIG2	Software and Services Opportunities in National Governments	Quarter 4
IEIT2	Software and Services Opportunities in Transportation	Quarter 3
	Software and Services Market	
IEII2	Insurance	Quarter 3
IEIB2	Banking & Finance	Quarter 3
IEID2	Discrete Manufacturing	Quarter 4
IEIP2	Process Manufacturing	Quarter 3
IEIR2	Retail & Wholesale Distribution	Quarter 3
ISSUE REPORTS		
IERE2	Software Re-engineering in Europe	Quarter 2
IEOS2	IT Services—Growth or Decline?	Quarter 4
IEEA2	IT Spending Patterns—Europe, 1992-1997	Quarter 3
IEVP2	Leading Vendor Competitor Analysis	Quarterly

Customer Services Program—Europe

CODE	Title	Ship Schedule/Month Shipped
CEERB	Research Bulletins	Monthly
CECSP	Program Introduction	Quarter 2
	Definitions & Economic Assumptions	Quarter 2
CEVS2	Professional Services Strategies	Quarter 3
CEDT2	Impact of Downsizing on Customer Services Organisations	Quarter 2
CERS2	Open Systems Services	Quarter 3
CESM2	IT Customer Services Market, 1992-1997	Quarter 2
CEIM2	European Multivendor Maintenance Markets, 1992-1997	Quarter 2
	IT Customer Services Satisfaction Analysis	
CEUL2	Large Systems	Quarter 3
CEUM2	Midrange Systems	Quarter 3
CEUS2	PCs/Workstations	Quarter 3
CETS2	IT Customer Services Trends and Issues	Quarter 4
CEQSR	Service Update Newsletter	Monthly

Systems Integration Program—Europe

CODE	Title	Ship Schedule/Month Shipped
SEERB	Research Bulletins	Quarterly
SESIP	Program Introduction Definitions & Economic Assumptions	
SEIN2	Impact of Downsizing on SI	Quarter 3
SEIC2	SI Opportunities in Re-engineering	Quarter 4
SEIV2	Methods for Successful SI Projects	Quarter 2
SEIM2	Systems Integration Markets, 1992-1997	Quarter 3
SEVR2	SI Vendor Analysis	Quarterly

Outsourcing Information Systems Program—Europe

CODE	Title	Ship Schedule/Month Shipped
OEERB	Research Bulletins	Quarterly
OEOSP	Program Introduction Definitions & Economic Assumptions	
OESO2	Outsourcing Systems Operations	Quarter 3
OECS2	Outsourcing Network Management and Operations	Quarter 4
OEDT2	Outsourcing Desktop Services	Quarter 3
OEAM2	Outsourcing Applications Management	Quarter 4
OEMF2	Information Systems Outsourcing Market Opportunities, 1992-1997	Quarter 3
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INPUT

Corporate Staff Profiles

Peter A. Cunningham, ***President and founder of INPUT,*** has more than 25 years of experience in the computer software and services industry. Mr. Cunningham began INPUT in 1974, after more than a decade of computer services industry consulting with major organizations both in the United States and Europe, and after serving as president of a successful software firm. He came to the United States with C-E-I-R, where he managed systems development for the American Research Bureau. Earlier in his career, Mr. Cunningham developed software for International Computer Ltd. Mr. Cunningham addresses the directions of the information services industry throughout the world. He is a frequent guest speaker and participates directly in major research projects. Mr. Cunningham holds a B.Sc. degree from Imperial College, London, and an M.P.A. degree from American University in Washington, D.C.

James Allison is a research analyst conducting research and analysis for the Federal Information Technology and Services Program in INPUT's Washington, D.C. office. Mr. Allison is experienced in marketing research using personal computers and data base software. Before joining INPUT, he provided client support on software and modem products at Data Broadcasting Corporation. Mr. Allison earned a B.A. in business from the College of William and Mary.

George E. Altevogt is a sales manager with over 18 years of sales and marketing experience in the computer information industry. With INPUT, he provides information and solutions to the federal vendor community. Mr. Altevogt holds a B.S. degree from the University of Maryland.

Sylvie Bénech heads INPUT's Paris subsidiary and is responsible for the development and support of clients in France. Mrs. Bénech has over 12 years of in-depth experience in marketing and strategic planning and communications in international IT markets. Prior to joining INPUT, Mrs. Bénech worked with two software and services companies (Dataid and Econocom) as Development Manager and International Marketing Manager. Mrs. Bénech has spoken on IT markets at several conferences in France and the U.S.A., collaborated in writing a book, and has published several articles. Mrs. Bénech holds a Master of Science degree in Economics from the University of Paris, and a degree from IAE Institut d'Administration des Entreprises of Paris.

Torrey K. Byles provides analysis and consulting services on the market and technologies of electronic data interchange (EDI) and other electronic commerce systems. Prior to joining INPUT, he covered EDI for the *Journal of Commerce* and wrote for trade magazines and newspapers in a staff and freelance capacity. Mr. Byles holds a B.A. in economics from the University of California, San Diego and attended the graduate program in education at California State University, Los Angeles.

INPUT
6/29/92

Patricia E. Cunningham is a Vice President and INPUT's Corporate Secretary. Ms. Cunningham is responsible for finance, corporate accounting, administration, and personnel—as well as INPUT program report production.

Mark Drisko represents INPUT in the marketing of reports and services. He has over 12 years of management experience in banking and sales. He holds a degree from the College of San Mateo.

Christopher Forest is a research analyst tracking information for INPUT's Procurement Analysis Reports (PARs) and providing client support for the Federal Information Technology and Services Program. Previously, he worked with Zenith Data Systems. Mr. Forest holds a B.A. in economics and Spanish from the University of Richmond.

John E. Frank is Vice President and senior staff adviser in the Washington office. With special emphasis on communications and federal government markets, Mr. Frank's 39-year career encompasses a wide range of senior management, marketing, engineering, technology, and business forecasting positions. Most recently, he was Director of Planning and Administration for Computer Sciences Corporation's System Group, and had responsibility for research and preparation of mid- and long-range market plans and business forecasts. A registered professional engineer, Mr. Frank holds a B.S. degree in industrial engineering and management from Fairleigh Dickinson University and has done advanced studies at George Washington University and the University of Michigan.

Barbara Fisher has been with INPUT for over five years as Washington's office manager. Currently, Barbara provides support to the company's sales and marketing efforts. Ms. Fisher is currently pursuing a degree in Marketing.

Roger Fulton is a consultant at INPUT's London office with over 27 years of experience in the computer industry, including ten years in systems engineering and fifteen years in marketing, covering research planning and management. Mr. Fulton specializes in analysis, forecasting, and strategic consultancy on European trends in the computer software and services markets. Prior to joining INPUT, he held various marketing posts with the U.K. systems group ITL plc. Mr. Fulton holds a Bachelor of Technology (electronics, honours) degree from Loughborough University in England, is a Chartered Engineer and member of the Institute of Electronic Engineers (MIEE).

Terye A. Galvan is an associate consultant and a specialist in information services vendor analysis. Ms. Galvan closely monitors vendor profitability, revenue distribution, vertical and cross-industry market participation, computing capabilities, product/service offerings, and marketing strategies. Her ten years of experience in the research industry include field research, research analysis, and research training with INPUT and Ames Research Center, NASA. Ms. Galvan holds a B.A. degree from the University of Santa Clara and an M.S. degree from San Jose State University.

Nancy Hill is responsible for U.S. account management, client support, and new business development. Her 20 years of experience in the information industry include personnel management, marketing, and sales. Before joining INPUT, she held a management position with Stanford University. Ms. Hill majored in business administration at Washington State University and San Jose State University.

Tetsuo Imai is president of INPUT, K.K.—INPUT's Tokyo office. Since the establishment of INPUT, K.K. (October 1989), Mr. Imai has been responsible for the marketing of INPUT's services as well as research for Japanese and U.S. information services companies. Prior to the establishment of INPUT, K.K., Mr. Imai was president and founder of Future Knowledge Institute (FKI), an information services company through which he acted as representative for INPUT in Japan. He was responsible for marketing INPUT's services, custom studies, and merger-and-acquisition services. Mr. Imai has held positions at Business International, Creative Strategies, and Nichirei. Mr. Imai is a graduate of Tokyo University.

Dianne Kaminsky, a research analyst in INPUT"s Washington D.C. office, researches the federal procurement process and tracks contract opportunities. She provides client support, writes and updates Procurement Analysis Reports (PARs) and is responsible for Freedom of Information Ace (FOIA) administration. Ms. Kaminsky holds a B.S. in Management and Economics from Towson State University, and M.B.A. from the University of Baltimore.

Paul Kendrick markets INPUT's reports and services. He has over twenty years' experience in senior-level sales positions in the investment community. Mr. Kendrick holds a B.A. from Boston College and an MBA from Harvard Business School.

Angela King is a senior research analyst with experience in market research within the federal computer and systems integration industries. Ms. King compiles market analysis reports and provides customer support for the Federal Information Technology and Services Program. Previously, Ms. King conducted market research for PRC, Inc., and maintained various marketing information data bases. Ms. King holds a B.B.A. (Management and Economics) from James Madison University, Harrisonburg, Virginia, and is an M.B.A. candidate (Marketing) at Virginia Polytechnic Institute in Fairfax, Virginia.

Scott Lewis is responsible for sales and account management for INPUT"s Washington, D.C. office, primarily in the Federal Information Technology and Services Program. Prior to joining INPUT, he held sales positions with the federal government divisions of Harris/Lanier and *Federal Technology*.

Peter Lines is Vice President and Managing Director of INPUT, LTD. and is responsible for all of INPUT's European program research and custom consulting. He has successfully implemented various research programs for INPUT, and has provided analysis and forecasting of major trends in the computer software and services business in Western Europe. Mr. Lines has 23 years of experience in the computer industry, including various management positions with Sperry Computer Systems. Mr. Lines earned a B.Sc. degree in economics from the London School of Economics.

Michael A. P. Longy is a principal consultant at INPUT's London office, with 29 years of experience in the computer industry. Mr. Longy specializes in the network services market in Europe, also working in the professional services, software products and graphics technologies areas. Previously, Mr. Longy was an independent marketing consultant, researching the Western European software and services markets, worked with INPUT from 1979 until 1981 in the Market Analysis Service, and was director (and founder) of PMA Consultants Limited, a U.K. professional services company. Mr. Longy holds a B.Sc (Physics), and is an Associate of the Royal College of Science, Imperial College, London; a member of the British Computer Society (M.B.C.S); and a Chartered Engineer (C Eng.).

John McGann is a principal consultant at INPUT. He has 30 years of experience in the computer industry, including experience in IS management as well as marketing and consulting in the information services industry. With INPUT, Mr. McGann provides consulting services to executives and planners, and specializes in analyzing marketing and product plans and forecasting trends in the use of information services. Prior to joining INPUT, Mr. McGann was a Vice President of Information Systems Planning at Chase Bank. He holds a B.S. degree in electrical engineering/economics from the Massachusetts Institute of Technology and an M.A. from Columbia University.

John D. McGilvray is a principal consultant with INPUT, and has 27 years of experience in the computer industry, including consulting and computer services. Mr. McGilvray specializes in the analysis and forecasting of the processing and network services markets and vertical industry sectors. Previously, he was an Executive Consultant and Director of Planning and Communications with Control Data Corporation, responsible for strategic and operational planning. Mr. McGilvray spent ten years with IBM as a systems engineer, salesman and manager, and was responsible for IBM's Western Region Operating Centers. Mr. McGilvray holds a B.Sc (Business Administration and Philosophy), University of San Francisco, California, and an M.B.A. (Finance) from University of California, Berkeley.

Carol Nice is a senior marketing analyst with INPUT, providing marketing and sales support for INPUT's London office. Ms. Nice holds an honors degree in European Studies from the University of Bath.

Alan L. Nilsen has 20 years of experience in the information services industry and has served as an internal corporate staff consultant in information technology, business development, and marketing strategy. Mr. Nilsen directs the Systems Integration Program for both commercial and federal sectors. Prior to joining INPUT, Mr. Nilsen was the Government Marketing Manager for Control Data Corporation's Business Information Services Division, responsible for government marketing and business development. Mr. Nilsen holds a B.S., Engineering, U.S. Naval Academy and an M.S., Administration, The George Washington University.

Thomas O'Flaherty is Vice President in charge of INPUT's New York office. He is responsible for commercial client support and custom consulting in the eastern region. He has directed over 100 research and consulting assignments relating to market strategy, new products and services, and diversification. He was Director of Research at Broadview Associates, an investment banking firm, and has also had hands-on experience at every IS department level. Mr. O'Flaherty has a B.A. from Colgate University, is a member of the Society of Information Management, a founding member of the American Association for Medical Systems and Informatics, and holds a Certificate in Data Processing (CDP).

Richard Perrotti represents INPUT in the marketing of reports and services. Mr. Perrotti has five years of experience in environmental fundraising and in sales of computer software, video training, advertising, and newsletters. He holds a B.A. in psychology from Rhode Island College and a Master of Education degree in counseling from American University, Washington, D.C.

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John Willmott is a consultant in INPUT's London office. Mr. Willmott has 19 years of experience in the computer industry, the majority of it in strategic marketing. He specializes in market analysis and forecasting within the computer software and services sector, and currently contributes to INPUT's Information Services Industry Program—Europe. Prior to joining INPUT, Mr. Willmott held a number of marketing positions within the computer industry, including responsibility for all sales and marketing activity at FMM Computer Consultants, Ltd. He began his career with ICL as a systems engineer. Mr. Willmott holds a B.A. (natural sciences) from Cambridge University and an M.B.A. from Manchester Business School.

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INPUT

Corporate Staff Profiles

Peter A. Cunningham, *President and founder of INPUT*, has more than 25 years of experience in the computer software and services industry. Mr. Cunningham began INPUT in 1974, after more than a decade of computer services industry consulting with major organizations both in the United States and Europe, and after serving as president of a successful software firm. He came to the United States with C-E-I-R, where he managed systems development for the American Research Bureau. Earlier in his career, Mr. Cunningham developed software for International Computer Ltd. Mr. Cunningham addresses the directions of the information services industry throughout the world. He is a frequent guest speaker and participates directly in major research projects. Mr. Cunningham holds a B.Sc. degree from Imperial College, London, and an M.P.A. degree from American University in Washington, D.C.

James Allison is a research analyst conducting research and analysis for the Federal Information Technology and Services Program in INPUT's Washington, D.C. office. Mr. Allison is experienced in marketing research using personal computers and data base software. Before joining INPUT, he provided client support on software and modem products at Data Broadcasting Corporation. Mr. Allison earned a B.A. in business from the College of William and Mary.

George E. Altevogt is a sales manager with over 18 years of sales and marketing experience in the computer information industry. With INPUT, he provides information and solutions to the federal vendor community. Mr. Altevogt holds a B.S. degree from the University of Maryland.

Sylvie Bénech heads INPUT's Paris subsidiary and is responsible for the development and support of clients in France. Mrs. Bénech has over 12 years of in-depth experience in marketing and strategic planning and communications in international IT markets. Prior to joining INPUT, Mrs. Bénech worked with two software and services companies (Dataid and Econocom) as Development Manager and International Marketing Manager. Mrs. Bénech has spoken on IT markets at several conferences in France and the U.S.A., collaborated in writing a book, and has published several articles. Mrs. Bénech holds a Master of Science degree in Economics from the University of Paris, and a degree from IAE Institut d'Administration des Entreprises of Paris.

Torrey K. Byles provides analysis and consulting services on the market and technologies of electronic data interchange (EDI) and other electronic commerce systems. Prior to joining INPUT, he covered EDI for the *Journal of Commerce* and wrote for trade magazines and newspapers in a staff and freelance capacity. Mr. Byles holds a B.A. in economics from the University of California, San Diego and attended the graduate program in education at California State University, Los Angeles.

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Patricia E. Cunningham is a Vice President and INPUT's Corporate Secretary. Ms. Cunningham is responsible for finance, corporate accounting, administration, and personnel—as well as INPUT program report production.

Mark Drisko represents INPUT in the marketing of reports and services. He has over 12 years of management experience in banking and sales. He holds a degree from the College of San Mateo.

Christopher Forest is a research analyst tracking information for INPUT's Procurement Analysis Reports (PARs) and providing client support for the Federal Information Technology and Services Program. Previously, he worked with Zenith Data Systems. Mr. Forest holds a B.A. in economics and Spanish from the University of Richmond.

John E. Frank is Vice President and senior staff adviser in the Washington office. With special emphasis on communications and federal government markets, Mr. Frank's 39-year career encompasses a wide range of senior management, marketing, engineering, technology, and business forecasting positions. Most recently, he was Director of Planning and Administration for Computer Sciences Corporation's System Group, and had responsibility for research and preparation of mid- and long-range market plans and business forecasts. A registered professional engineer, Mr. Frank holds a B.S. degree in industrial engineering and management from Fairleigh Dickinson University and has done advanced studies at George Washington University and the University of Michigan.

Barbara Fisher has been with INPUT for over five years as Washington's office manager. Currently, Barbara provides support to the company's sales and marketing efforts. Ms. Fisher is currently pursuing a degree in Marketing.

Roger Fulton is a consultant at INPUT's London office with over 27 years of experience in the computer industry, including ten years in systems engineering and fifteen years in marketing, covering research planning and management. Mr. Fulton specializes in analysis, forecasting, and strategic consultancy on European trends in the computer software and services markets. Prior to joining INPUT, he held various marketing posts with the U.K. systems group ITL plc. Mr. Fulton holds a Bachelor of Technology (electronics, honours) degree from Loughborough University in England, is a Chartered Engineer and member of the Institute of Electronic Engineers (MIEE).

Terye A. Galvan is an associate consultant and a specialist in information services vendor analysis. Ms. Galvan closely monitors vendor profitability, revenue distribution, vertical and cross-industry market participation, computing capabilities, product/service offerings, and marketing strategies. Her ten years of experience in the research industry include field research, research analysis, and research training with INPUT and Ames Research Center, NASA. Ms. Galvan holds a B.A. degree from the University of Santa Clara and an M.S. degree from San Jose State University.

Nancy Hill is responsible for U.S. account management, client support, and new business development. Her 20 years of experience in the information industry include personnel management, marketing, and sales. Before joining INPUT, she held a management position with Stanford University. Ms. Hill majored in business administration at Washington State University and San Jose State University.

Tetsuo Imai is president of INPUT, K.K.—INPUT's Tokyo office. Since the establishment of INPUT, K.K. (October 1989), Mr. Imai has been responsible for the marketing of INPUT's services as well as research for Japanese and U.S. information services companies. Prior to the establishment of INPUT, K.K., Mr. Imai was president and founder of Future Knowledge Institute (FKI), an information services company through which he acted as representative for INPUT in Japan. He was responsible for marketing INPUT's services, custom studies, and merger-and-acquisition services. Mr. Imai has held positions at Business International, Creative Strategies, and Nichirei. Mr. Imai is a graduate of Tokyo University.

Dianne Kaminsky, a research analyst in INPUT"s Washington D.C. office, researches the federal procurement process and tracks contract opportunities. She provides client support, writes and updates Procurement Analysis Reports (PARs) and is responsible for Freedom of Information Ace (FOIA) administration. Ms. Kaminsky holds a B.S. in Management and Economics from Towson State University, and M.B.A. from the University of Baltimore.

Paul Kendrick markets INPUT's reports and services. He has over twenty years' experience in senior-level sales positions in the investment community. Mr. Kendrick holds a B.A. from Boston College and an MBA from Harvard Business School.

Angela King is a senior research analyst with experience in market research within the federal computer and systems integration industries. Ms. King compiles market analysis reports and provides customer support for the Federal Information Technology and Services Program. Previously, Ms. King conducted market research for PRC, Inc., and maintained various marketing information data bases. Ms. King holds a B.B.A. (Management and Economics) from James Madison University, Harrisonburg, Virginia, and is an M.B.A. candidate (Marketing) at Virginia Polytechnic Institute in Fairfax, Virginia.

Scott Lewis is responsible for sales and account management for INPUT"s Washington, D.C. office, primarily in the Federal Information Technology and Services Program. Prior to joining INPUT, he held sales positions with the federal government divisions of Harris/Lanier and *Federal Technology*.

Peter Lines is Vice President and Managing Director of INPUT, LTD. and is responsible for all of INPUT's European program research and custom consulting. He has successfully implemented various research programs for INPUT, and has provided analysis and forecasting of major trends in the computer software and services business in Western Europe. Mr. Lines has 23 years of experience in the computer industry, including various management positions with Sperry Computer Systems. Mr. Lines earned a B.Sc. degree in economics from the London School of Economics.

Michael A. P. Longy is a principal consultant at INPUT's London office, with 29 years of experience in the computer industry. Mr. Longy specializes in the network services market in Europe, also working in the professional services, software products and graphics technologies areas. Previously, Mr. Longy was an independent marketing consultant, researching the Western European software and services markets, worked with INPUT from 1979 until 1981 in the Market Analysis Service, and was director (and founder) of PMA Consultants Limited, a U.K. professional services company. Mr. Longy holds a B.Sc (Physics), and is an Associate of the Royal College of Science, Imperial College, London; a member of the British Computer Society (M.B.C.S); and a Chartered Engineer (C Eng.).

John McGann is a principal consultant at INPUT. He has 30 years of experience in the computer industry, including experience in IS management as well as marketing and consulting in the information services industry. With INPUT, Mr. McGann provides consulting services to executives and planners, and specializes in analyzing marketing and product plans and forecasting trends in the use of information services. Prior to joining INPUT, Mr. McGann was a Vice President of Information Systems Planning at Chase Bank. He holds a B.S. degree in electrical engineering/economics from the Massachusetts Institute of Technology and an M.A. from Columbia University.

John D. McGilvray is a principal consultant with INPUT, and has 27 years of experience in the computer industry, including consulting and computer services. Mr. McGilvray specializes in the analysis and forecasting of the processing and network services markets and vertical industry sectors. Previously, he was an Executive Consultant and Director of Planning and Communications with Control Data Corporation, responsible for strategic and operational planning. Mr. McGilvray spent ten years with IBM as a systems engineer, salesman and manager, and was responsible for IBM's Western Region Operating Centers. Mr. McGilvray holds a B.Sc (Business Administration and Philosophy), University of San Francisco, California, and an M.B.A. (Finance) from University of California, Berkeley.

Carol Nice is a senior marketing analyst with INPUT, providing marketing and sales support for INPUT's London office. Ms. Nice holds an honors degree in European Studies from the University of Bath.

Alan L. Nilsen has 20 years of experience in the information services industry and has served as an internal corporate staff consultant in information technology, business development, and marketing strategy. Mr. Nilsen directs the Systems Integration Program for both commercial and federal sectors. Prior to joining INPUT, Mr. Nilsen was the Government Marketing Manager for Control Data Corporation's Business Information Services Division, responsible for government marketing and business development. Mr. Nilsen holds a B.S., Engineering, U.S. Naval Academy and an M.S., Administration, The George Washington University.

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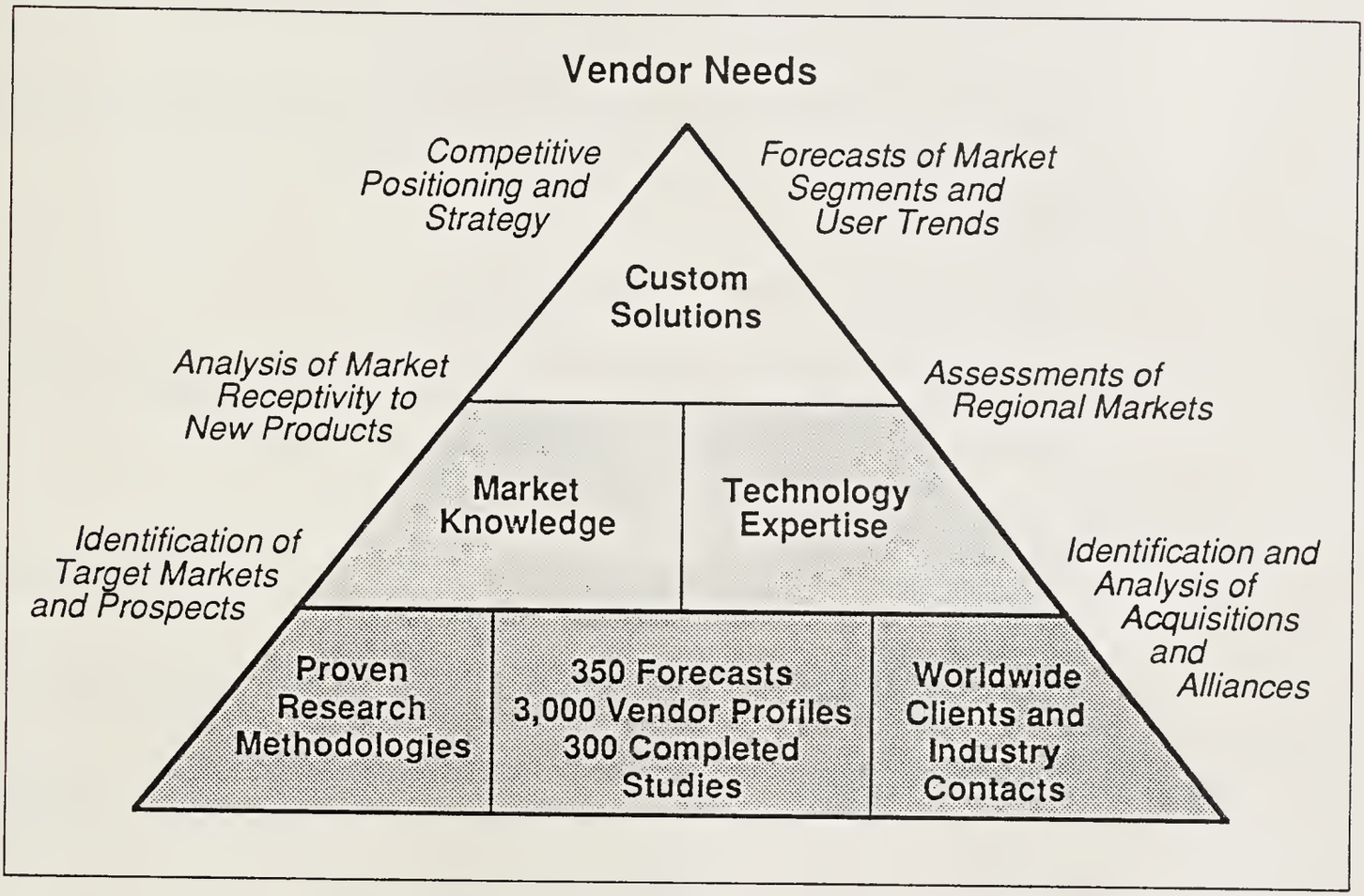
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Custom Research and Consulting for the Information Systems & Services Industry



Clients' specific needs are addressed by INPUT's **Custom Research and Consulting Services.** These services leverage subscription program research, staff expertise, and breadth of coverage to provide targeted solutions in:

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- New Technology Assessments
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- Outsourcing/Planning & Analysis
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- Rapid, objective response to specific needs
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SUBJECT AREAS

Opportunity Analysis	Analysis and recommendations based on user and vendor research
Regional Market Analysis	Analysis of markets, competition, and opportunities for specific regions or metropolitan areas.
Competitive Analysis	Analysis of competitors' strategies and practices, or the competitive structure of the market for specific offerings.
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Customer Satisfaction	Determination of customer satisfaction levels compared to buyer needs and competition.
Information Systems Assessments	Information systems strategy, organization, direction, etc. Particular emphasis on outsourcing and downsizing.
Application Development (CASE)	Market sizing, product comparisons, user consulting, strategy assessments.

For more details, please contact your nearest INPUT office.

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Washington, D.C. Tel. (703) 847-6870; Fax (703) 847-6872
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INPUT ANNUAL CONFERENCE SCHEDULE 1992

FEDERAL INFORMATION SYSTEMS AND SERVICES PROGRAM CONFERENCE

Tysons Corner Marriott, Vienna, Virginia June 11 and 12, 1992

Understand the forces behind continued federal market growth. Explore likely legislative, program, regulatory, and funding trends among the major agencies. INPUT's federal conference presents the views and plans of leading agency and contractor executives, including presentations on:

- The overall federal forecast
- Major competitive initiatives and their driving forces
- Major federal policy trends and their likely impacts on upcoming initiatives
- Vendor views on approaching the federal market from various perspectives

Conference fees for INPUT clients: No charge for the first two attendees for subscribers to the Federal Information Systems and Services Program; $295 for each additional attendee or subscribers to other INPUT programs.
Conference fees for non-clients: $795; $545 for each additional attendee.

SYSTEMS INTEGRATION PROGRAM CONFERENCE

Fairview Park Marriott, Falls Church, Virginia July 21 and 22, 1992

Evaluate key technological, economic, industrial, and personnel trends driving the commercial SI market. Users and vendors, along with INPUT experts, present unique perspectives on the market as a whole, as well as on various market niches. The 1992 conference will focus on:

- The overall commercial SI market
- The roles and effects of downsizing and outsourcing in SI
- Opportunities in networking SI
- Leading vertical markets for SI opportunities

Conference fees for INPUT clients: No charge for the first two attendees for subscribers to the Systems Integration Program; $295 for each additional attendee or subscribers to other INPUT programs.
Conference fees for non-clients: $795; $545 for each additional attendee.

continued...

OUTSOURCING INFORMATION SYSTEMS PROGRAM CONFERENCE

(formerly Systems Operations Program)

Ritz-Carlton Hotel, McLean, Virginia September 17 and 18, 1992

Monitor the pulse of outsourcing market changes. Both vendors and users have the opportunity to look at what services are really being outsourced and why. Key issues include:

- Are desktop services the answer to a client's LAN management nightmare—or a vendor's strategy to jump on the downsizing express?
- Are clients really turning over applications development to vendors?
- Is network management being outsourced more frequently?
- Why are organizations outsourcing accounting and customer services operations?
- How can the vendor and client better manage the outsourcing agreement?

Conference fees for INPUT clients: No charge for the first two attendees for subscribers to the Outsourcing Information Systems Program; $295 for each additional attendee or subscribers to other INPUT programs.
Conference fees for non-clients: $795; $545 for each additional attendee.

1992 U.S. EXECUTIVE CONFERENCE

Fairmont Hotel, San Francisco, California October 4, 5, and 6, 1992

Gain a thorough understanding of the major trends within the information services industry—economic, technological, and structural. Evaluate the impacts on the market, its projected growth, leading vendors, and future directions. This conference focuses in particular on the downsizing revolution and its impacts on the industry. Key topics include:

- The information services industry forecast
- Downsizing implications on information systems and vendors
- Strategies for turning downsizing into an opportunity
- Workshops on each of the 8 market segments: processing services; turnkey systems; applications software products; systems operations; systems integration; professional services; network services; and systems software products

Conference fees for INPUT clients: No charge for the first two attendees for subscribers to the Market Analysis, Vendor Analysis, EDI/Electronic Commerce, and Downsizing Information Systems Programs; $295 for each additional attendee or subscribers to other INPUT programs.
Conference fees for non-clients: $895; $545 for each additional attendee.

Join the leading experts and INPUT senior consultants to get first-hand information on what's happening in these various industries. And don't miss a unique opportunity to network with your peers.

Register today! To register for any of these conferences, or for more information, call Barbara Fisher, Conference Coordinator, at (703) 847-6870. If you are not a client, take advantage of an early registration discount of 10% by registering 30 days prior to the event.

Sincerely,

Barbara A. Fisher
Conference Coordinator

P.S. Should you decide you are unable to attend these events, we trust that you will pass this information on to the appropriate individual(s) in your company.

INPUT

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August 21, 1992

Dear Colleague:

As a result of feedback we've received from a number of our clients in planning INPUT's annual executive conference, we have decided to reschedule it as indicated below. The conference will be held at the same location, the Fairmont Hotel in San Francisco. Please take a minute now to note the new date:

New Date!

INPUT U.S. EXECUTIVE CONFERENCE

Competing in a Revolution

November 1, 2, & 3, 1992

You have told us that the information technology "revolutions" INPUT has identified—outsourcing, downsizing, networking, and re-engineering—are indeed having a profound effect on your business. Accordingly, our conference approach has been adjusted to concentrate on INPUT's research and insights on these important topics. We are excited about the conference and look forward to delivering the ideas and expert advice necessary for your strategic planning efforts for 1993 and beyond... helping you to compete in a revolution.

Please mark your calendar for November 1, 2 and 3, 1992. We look forward to seeing you there.

Sincerely,

G. Christopher Smith
Vice President

P.S. Call our conference coordinators—Barbara Fisher at (703) 847-6870 or Glenna Nathans at (415) 961-3300 to register for this important conference!

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Discrete and Process Manufacturing—

What Are the Information Services Opportunities?

- Understand the challenges of these core industries as they struggle to compete in a global market.
- Identify the effects of the recession, regulatory actions, and competition.
- Identify *your* information services opportunities in this marketplace.

All this, and more, is contained in INPUT's two new 1992 industry reports,

Information Services Opportunities and Trends, 1992-1997

Position Your Business to Take Advantage of New IS Opportunities

Information Services Trends and Issues — What are Your Opportunities?

Discrete manufacturing is one of America's core industries—the backbone of the American economy.

INPUT's assessment of the trends and issues affecting this market, as a whole, and by delivery mode, pinpoints your most promising information services opportunities through 1997.

Discrete Manufacturing—

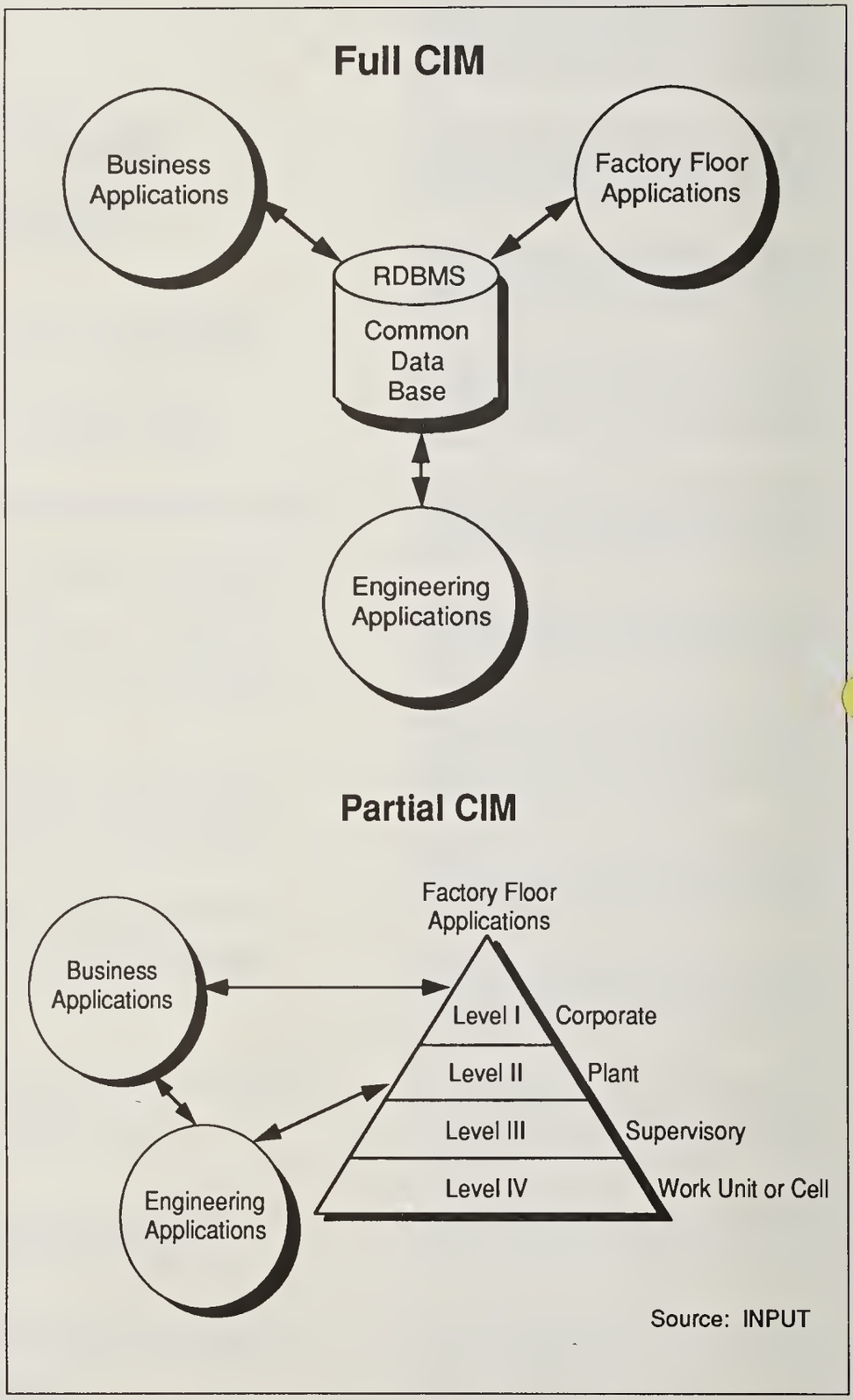
Understand the key needs driving the use of information services:

- **More interconnection**
- **Access to data**
- **Downsizing**
- **Client/server**
- **Costs**

Convert needs into business opportunities:

- **Plan successful product strategies.**
- **Identify new opportunities.**
- **Understand your key competitors.**

Develop effective competitive strategies by identifying key competitors and understanding their strengths and weaknesses.



Understand the differences between full and partial CIM implementations and what that means to services vendors.

Process Manufacturing —

Understand the forces that have been driving the key sectors of the processing services industry:

- **Chemicals**
- **Petroleum**
- **Paper and pulp**
- **Food and beverage**

Identify key applications areas for process manufacturers and focus your products and services on these markets of opportunity.

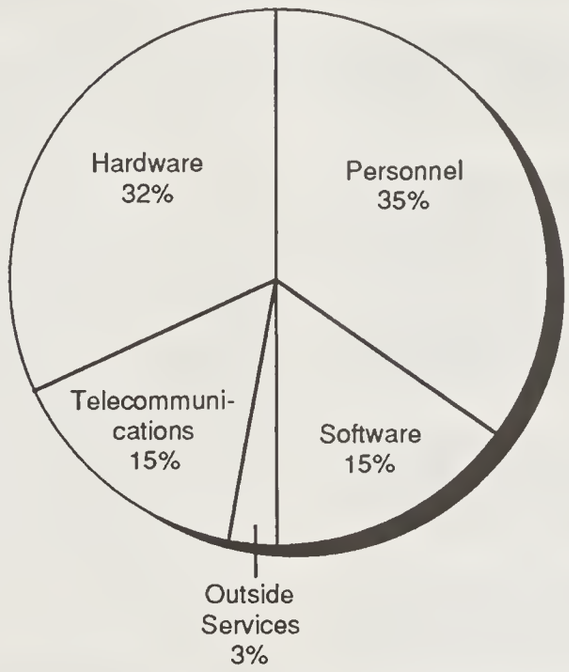
Delivery Mode Trends: Which segments within the processing services industry are buying services in which delivery modes?

Developing Technologies: How are new technologies both inhibiting and driving vendor opportunities?

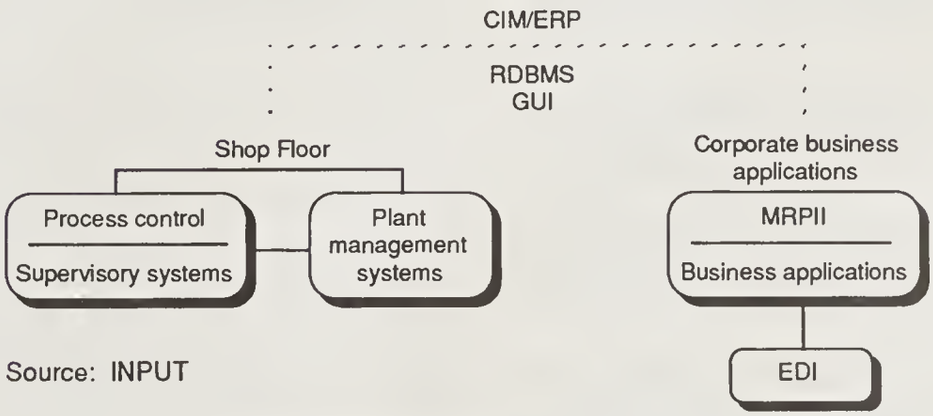
Regulatory Concerns: How is the growing burden of regulatory constraints affecting the processing services industry? Does this trend offer information services opportunities?

IS Budgets: Where is the IS function spending its budget dollars?

IS Expenditures in Process Manufacturing



IS Applications in Process Manufacturing



Source: INPUT

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U.S. Information Services Market Analysis Program

Analyzes the information services industry in the United States—

- Analysis of customer needs
- Market size and growth by industry, cross-industry, and product/service
- Competitive information—leading vendor profiles, market positioning, and strategies
- Impacts of downsizing, outsourcing, economy, networking, open systems, and re-engineering

INPUT's European offices offer a full complement of research and subscription services focused on the European markets.

Custom Consulting

INPUT conducts over 100 primary research studies for clients every year, many focused on downsizing topics. These have included analysis of product introductions, marketing strategies, competitive analysis, and vendor merger/acquisition study. For users, INPUT has evaluated specific applications, costs of downsizing, vendor evaluation, and the potential for outsourcing.

About INPUT

INPUT is a worldwide consulting and market research firm uniquely focused on the information technology services and software markets. Executives in many technically advanced companies in North America, Europe, and Japan rely on INPUT for data, objective analysis, and insightful opinions to support their business plans, market assessments, and technology directions. By leveraging INPUT's considerable knowledge and expertise, clients make informed decisions more quickly and benefit by saving on the cost of internal research.

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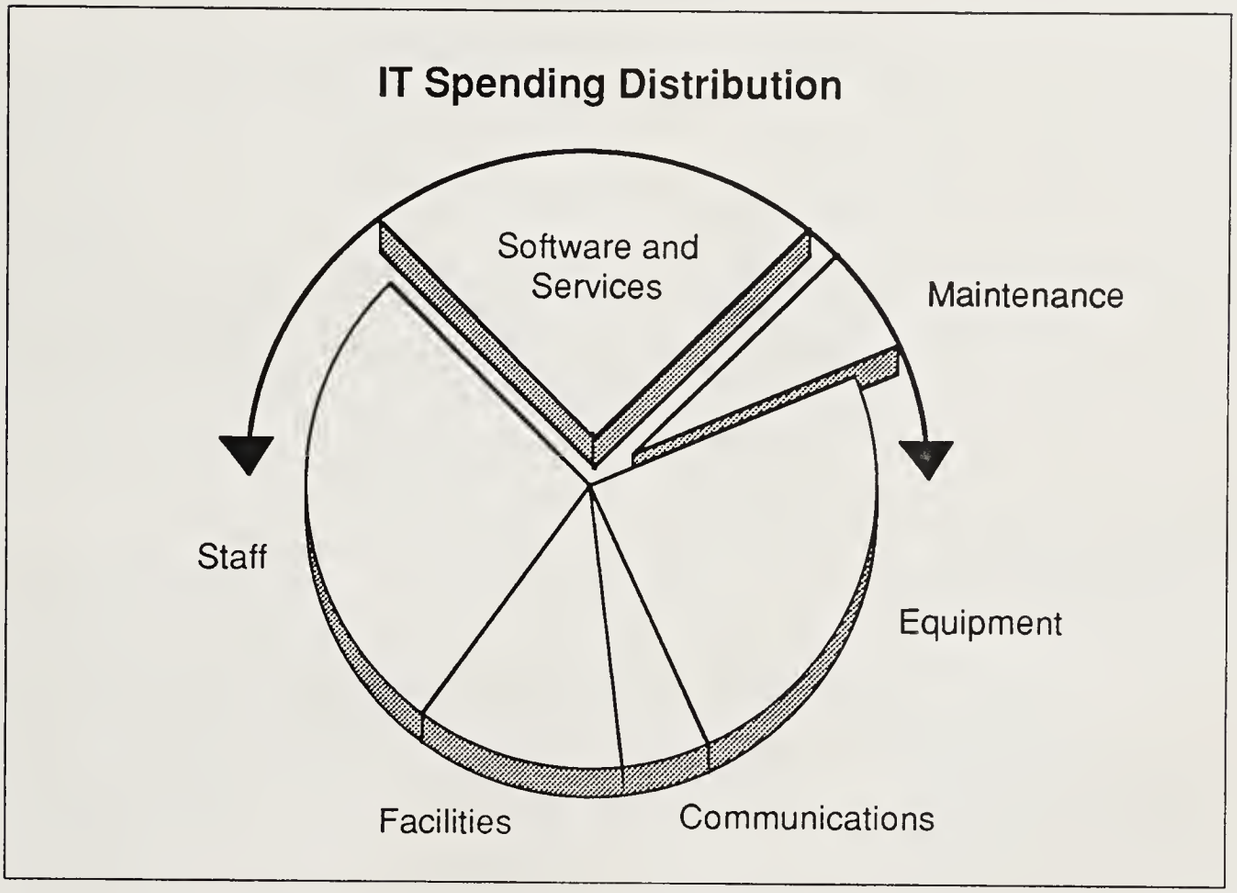
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U.S. Information Services Market Analysis Program



Analyzes the information services industry in the United States.

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U.S. Information Services Market Analysis Program

SUMMARY

Analyzes the information services industry in the United States.

REPORTS

Issue Reports

Client/Server Applications and Markets, 1992-1997
Pricing and Marketing Professional Services in the 1990s
Pricing and Marketing Software Products in the 1990s
Impact of Outsourcing on Professional Services Markets

Information Services Market Reports (1992-1997)

- *Information Services Industry*
- *Systems SW Products*
- *Professional Services*
- *Applications SW Products*
- *Systems Integration*
- *Turnkey Systems*
- *Systems Operations*
- *Equipment Services*
- *Processing Services*
- *Network Services*

Vertical and Cross-Industry Market Reports (1992-1997)

- *Discrete Manufacturing*
- *Retail Distribution*
- *Education*
- *Process Manufacturing*
- *Wholesale Distribution*
- *Business Services*
- *Transportation*
- *Banking and Finance*
- *Federal Government*
- *Utilities*
- *Insurance*
- *State & Local Gov't*
- *Telecommunications*
- *Health Services*
- *Miscellaneous Industries*
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U.S. Information Services Market Analysis Program

BACKGROUND and BENEFITS

In spite of its size—$110 billion in annual user expenditures—the U.S. information services industry is undergoing rapid and significant change. As sectors mature, new sectors develop with exciting growth. Driven by such trends as downsizing, outsourcing, open systems and re-engineering, the opportunities and competitors are changing continuously.

The 1990s will see the completion of the swing from a technology- and hardware-driven industry to a services-driven industry. The strategies of the largest and the smallest vendor must change to capture the new opportunities.

The buyer of information services and software products has been shifting from the central information systems executive to the general manager. This shift changes buying patterns, selling strategies and product offerings. Every vendor needs to review and revise strategies.

The **U.S. Information Services Market Analysis Program** is used by leading vendors in every segment of the industry to construct their market strategy.

Know Your Market	The market is changing rapidly; in some cases discontinuously. This program enables you to keep on top of, and indeed to predict, such changes.
Competitive Strategy	Understand what new competitors and key vendors are doing in the market.
Emerging Market Identification	Build a strategy for success in emerging markets —for example, UNIX, client/server and open systems.
Consulting Support	Build a professional support relationship with INPUT's experienced consultants. Test marketing ideas, strategies and tactics. Obtain market and vendor insights.
Networking	Develop working relationships with complementary vendors through client conferences and INPUT staff.
Marketing	Promote your company's capabilities and interests through INPUT's worldwide client and contact network.
Proven Results	Rely on INPUT's 17 years of forecasting this market.

U.S. Information Services Market Analysis Program

PROGRAM DESCRIPTION

Analyzes trends, issues, competition, spending patterns and opportunities in the rapidly changing information services industry in the United States. The program:

- Provides market analysis and five-year forecasts for 9 major market segments (delivery modes) and 22 subsegments (submodes) across 15 industry sectors and 7 cross-industry sectors—over 300 individual markets are projected annually
- Analyzes impacts of technology, economic and business trends on spending patterns within specific industry sectors and market segments
- Researches key information technology trends (downsizing, outsourcing, open systems) and identifies their impacts on the industry, the competitors and the information systems process in corporations
- Creates a professional support relationship between a client's business development and marketing staff and INPUT that assures access to the best market forecasts and trend analyses

INPUT has been analyzing this market for over 16 years. This program provides the most comprehensive forecast for the information services industry and is recognized for consistent market sizing, forecast projection and issue analysis.

RELATED INPUT PROGRAMS

Information Services Industry Market Analysis Programme—Europe

Information Services Vendor Analysis Program provides profiles and capabilities analyses of information services vendors.

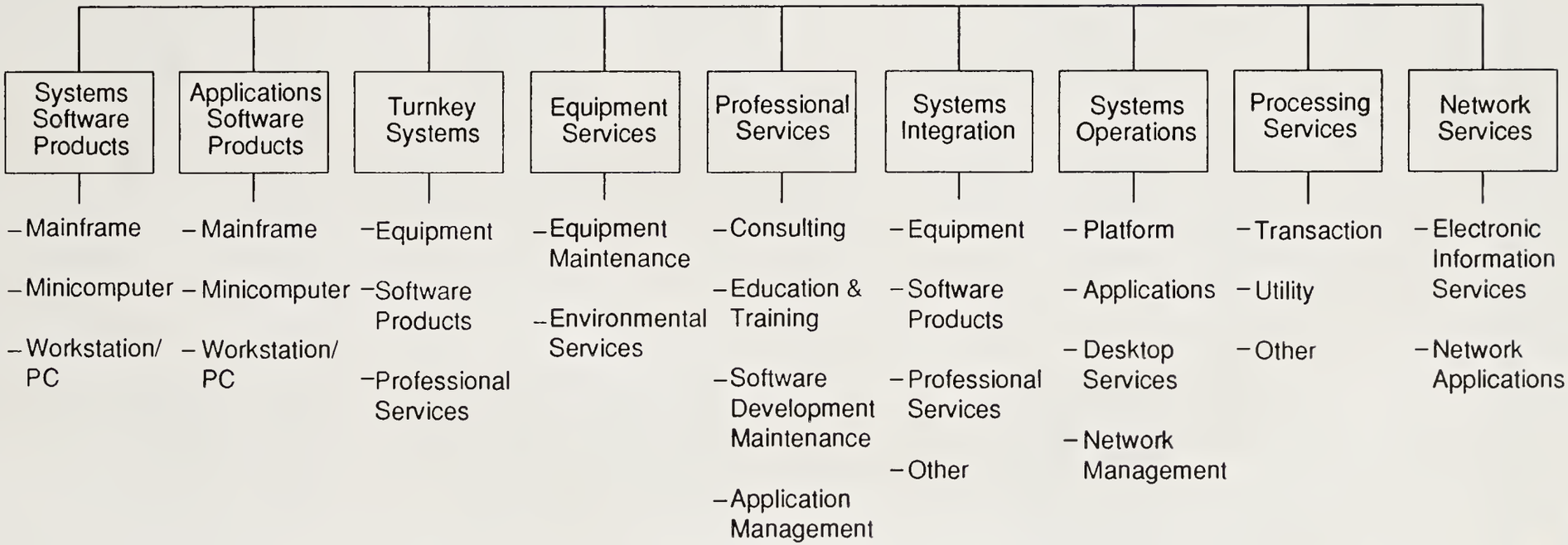
Outsourcing Information Systems Programs (U.S. and Europe) provide research on the revolution in systems operations, network operations, applications management and desktop services opportunities.

Systems Integration Programs (U.S. and Europe) analyze opportunities for vendor-provided solutions to complex information systems, communications, and automation requirements.

EDI and Electronic Commerce Program examines the marketing, competitive, and economic issues of the movement from paper to electronic-based commerce.

Custom Research and Consulting Services satisfy unique needs for market research, competitive analysis, IS strategy development, acquisition support and other tasks based on INPUT's extensive experience and information resources.

Information Services Industry Structure



Source: INPUT

U.S. Information Services Market Analysis Program

SCOPE OF SERVICES

9 DELIVERY MODES

- Systems Software Products
- Applications Software Products
- Turnkey Systems
- Equipment Services
- Professional Services
- Systems Integration
- Systems Operations
- Processing Services
- Network Services

15 INDUSTRY SECTORS

- Discrete Manufacturing
- Process Manufacturing
- Transportation
- Utilities
- Telecommunications
- Retail Distribution
- Wholesale Distribution
- Banking and Finance
- Insurance
- Health Services
- Education
- Business Services
- Federal Government
- State and Local Government
- Miscellaneous Industries

7 CROSS-INDUSTRY SECTORS

- Accounting
- Education and Training
- Engineering and Scientific
- Human Resources
- Office Systems
- Planning and Analysis
- Other

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CLIENT SUPPORT SERVICES

Clients gain maximum benefit from the industry research and consulting services available to them through the development of a strong, continuous relationship with INPUT staff. Through frequent contact and sharing of opinions and ideas, you receive a flexible response to changing areas of interest and focus. INPUT provides the following specific services in order to build a full relationship:

Consultant Access	Continuous support from INPUT's consultants and executives who are available to share opinions and reactions to events, and to discuss ideas and challenges.
On-Site Presentation	INPUT consultants present and discuss research findings at your site. Research presentations can be tailored to focus on your needs. Discuss specific interests and issues in confidence. This presentation is an excellent method of distributing key information through the organization and of obtaining more uses of the research materials.
Conference	Gain a thorough understanding of the major trends within the information services industry—economic, technological, and structural. Evaluate the impacts on the market, its projected growth, leading vendors, and future directions. This conference focuses in particular on the downsizing revolution and its impacts on the industry.
Telephone Inquiry Service	Satisfies requirements for short-term research needs (less than two hours), and clarification/amplification of report and presentation data.
Site Subscriptions	Complete program services to additional sites at substantially reduced fees.

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U.S. Information Services Market Analysis Program

MARKET REPORT DESCRIPTIONS

U.S. Processing Services Market, 1992-1997
This report analyzes the issues, driving and inhibiting forces, opportunities and strategies in processing services within the U.S. market. This is the most mature segment of the industry, growing at a steady but modest rate. While addressing the impact of the outsourcing directions of the 1990s, INPUT's annual assessment forecasts the next five years, identifies areas of opportunities, reviews leading competitors, and analyzes competitive issues.

U.S. Network Services Market, 1992-1997
Examines the issues, driving and inhibiting forces, opportunities and strategies in network services in the U.S. market. Forecasts are provided for each submode and industry for the next five years. Leading competitors are reviewed and competitive issues analyzed. Opportunities are identified and recommendations presented.

U.S. Professional Services Market, 1992-1997
Examines the issues, driving and inhibiting forces, opportunities and strategies in professional services within the U.S. market. Forecasts are provided for each submode and industry for the next five years. Leading competitors are reviewed and competitive issues analyzed. Opportunities are identified and recommendations presented.

U.S. Applications Software Products and Turnkey Systems Markets, 1992-1997
This report forecasts the applications software products and turnkey systems markets. These two closely affiliated markets are undergoing significant change because of downsizing, open systems and client/server technology. INPUT identifies the impacts and opportunities, profiles leading vendors, and reviews competitive issues. It also gives a five-year forecast by platform and industry sector.

U.S. Systems Software Products Market, 1992-1997
This report examines the market for systems software products. The market is segmented by systems control, applications development, and operations management products categories, as well as by platform level. The report forecasts the next five years, analyzes the impacts of new technologies and the strategies of leading vendors, and makes recommendations critical to a successful strategy.

U.S. Equipment Services Market, 1992-1997
This report analyzes the U.S. customer services market, growth expectations, issues and trends over the five-year forecast period. The report segments the market into manufacturer-supplied service and independent maintenance organizations (IMOs), and by product groupings: large systems, midrange systems, and PC/workstations.

U.S. Information Services Market Analysis Program

MARKET REPORT DESCRIPTIONS *(Continued)*

U.S. Systems Integration and Systems Operations Markets Overview, 1992-1997
The market forecasts for the next five years for systems integration and systems operations are summarized. The full market reports for these two delivery modes are provided as part of the Systems Integration and Outsourcing programs.

U.S. Information Services Industry Forecast Book, 1992-1997
This report, published at year end, contains all of the U.S. forecasts for the 9 delivery modes, 15 industry, and 7 cross-industry sectors as well as the industry as a whole. This report serves as a reference tool for subscribers.
A diskette, provided with the report, includes all of the forecast tables in spreadsheet format.

INDUSTRY SECTOR REPORT DESCRIPTIONS

U.S. Information Services Industry—Discrete Manufacturing Sector
This report evaluates the impact of trends in the discrete manufacturing sector on information services spending and use. The report provides detailed forecasts by type of service, identifies leading vendors and competitive trends, and analyzes the priorities of the information systems function in this industry.

U.S. Information Services Industry—Process Manufacturing Sector
For the process manufacturing sector the same analysis is provided. This industry has different priorities and spending patterns for information services and software products than does discrete manufacturing and warrants a separate review and report.

U.S. Information Services Industry—Telecommunications Sector
The telecommunications industry continues to undergo significant change through deregulation and increased price pressure. As the larger companies downsize, the need for information services is changing. This report analyzes the industry trends, provides forecasts and identifies opportunities.

U.S. Information Services Industry—Retail Distribution Sector
INPUT's report on retail distribution focuses on the impacts of competition and poor profitability on the use of information technology. The report provides the needed forecasts, competitive analysis and opportunity review to help information services vendors plan their strategies in this sector.

U.S. Information Services Market Analysis Program

INDUSTRY SECTOR REPORT DESCRIPTIONS *(Continued)*

U.S. Information Services Industry—Banking and Finance Sector
INPUT's annual review of this largest segment of the information services industry looks at how the industry is restructuring and the impact this is having on the information systems environment. Banking and finance is leading the way in the outsourcing and re-engineering areas and aggressively looking for ways to contain IT spending. The report provides a detailed five-year forecast and analyzes key competitive trends.

U.S. Information Services Industry—Insurance Sector
The U.S. insurance sector is struggling with outsourcing, downsizing and constraining IT spending in a period of declining profitability. INPUT's report provides five-year forecasts, and identifies leading vendors and opportunities.

U.S. Information Services Industry—Health Services Sector
The health services industry is under immense cost and governmental pressure. INPUT's market analysis identifies how IT is being used to meet these challenges, provides detailed forecasts and identifies information services opportunities.

U.S. Information Services Industry—Other Industry Sectors
INPUT also provides analysis and market forecasts for the following additional industry sectors on an annual basis:

Transportation	Business Services
Utilities	Federal Government
Wholesale Distribution	State and Local Government
Education	Miscellaneous Industries

CROSS-INDUSTRY SECTOR REPORT DESCRIPTIONS

Many information services and software products offerings are not specific to a particular industry. They can be acquired and deployed successfully on a cross-industry basis. Two examples are general accounting systems and human resource (personnel) systems. INPUT separates these from the industry sector markets and forecasts them separately. The seven sectors are:

Accounting	Human Resources
Education and Training	Office Systems
Engineering and Scientific	Planning and Analysis
Other	

U.S. Information Services Market Analysis Program

ISSUE REPORT DESCRIPTIONS

Client/Server Applications and Markets, 1992-1997
Client/server—the technology and the concept—have the applications software products market in a state of confusion. This report will investigate the concept, provide a framework for its application, and forecast the emerging software products market. A five-year projection will be provided and leading vendors analyzed.

Pricing and Marketing Professional Services in the 1990s
The professional services segment of the information services industry has experienced significant change in the past few years. With the emergence of systems integration, new competitors, new longer term offerings (e.g., applications management), and increased price competition caused in part by the recession, many of the rules for pricing and marketing services have changed. This report looks at the expectations of the buyer and the business practices of the vendors that are framing strategies for the 1990s.

Impact of Outsourcing on Professional Services Markets
The outsourcing revolution is now three years old and is beginning to cause further change in the way buyers purchase information services. Increasingly, professional services are purchased on a time-based relationship basis other than on a straight pay-as-you-consume basis. In addition, there are new offerings such as applications maintenance and applications management, desktop services, and more. This report looks at the impacts of outsourcing on traditional professional services vendors and how these vendors are changing and must change in the 1990s.

Pricing and Marketing Software Products in the 1990s
The software products industry is faced with significant challenges from downsizing, client/server, and open systems. The longstanding concepts of pricing and marketing based on platform size no longer work—buyers are shifting away from information systems and the cost structures of their business are changing. This report analyzes the business practices that must change within the software products industry for success in the 1990s.

U.S. Information Services Market Analysis Program

RESEARCH BULLETINS

Research Bulletins are frequent, short reports that:

1. Present results from research studies as quickly as possible. These Research Bulletins communicate key findings on issues, trends, new developments and ideas, market forecasts, and vendor analysis.
2. Provide INPUT's analyses of important industry announcements, events, awards, and other activities. These Research Bulletins analyze the meaning of these activities rather than just give the news.

Research Bulletins already published that are provided immediately include:

- *Elusive "Year of UNIX" Revisited*
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- *The IBM Reorganization: Viewed Through a Knothole*
- *The U.S. Distribution Market, 1991-1996*
- *Revolution or Evolution? The U.S. Information Services Industry in the 1990s*
- *Challenges and Potential of the U.S. Professional Services Market, 1991-1996*
- *Healthy Increase in Applications Software Products Budgets*
- *NCR/AT&T: A New Model of Computing?*
- *Sizing Up Downsizing*
- *Professional Services—Buyer Perspective*
- *Worldwide Information Services Market Forecast, 1990-1995*
- *Electronic Commerce: The New Foundation for Trade*
- *Public Information Services Vendors—1990 Performance*
- *UNIX—The User Perspective*
- *IBM Services Offerings: Field Empowerment*

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Dear Colleague:

As a professional services vendor, you need to know:

- How much the current recession is impacting the market
- How the market is changing
- The new market players
- How systems integration and systems operations affect your business
- What customers expect from a professional services vendor—now

New Opportunities in Professional Services Markets

INPUT's new report, entitled *U.S. Professional Services Market, 1991-1996,* analyzes the factors influencing the growth of the market and provides insight on changes in the market structure. You also get detailed, five-year forecasts of the professional services market by submode and by industry. You can use this information to strengthen your market position.

The report includes profiles on six key vendors in the professional services marketplace. These profiles highlight the differences in strategy, key products and services, and key markets between vendors. You can compare your market position with that of these leading vendors and with your competitors.

- American Management Systems
- American Software
- Analysts International
- Andersen Computing
- Computer Task Group
- Logicon

The recession affects all segments of the information services industry. Professional services is no exception. Market growth declined almost five percent between 1990 and 1991. You need to get the greatest benefit from your marketing and sales resources. INPUT's *U.S. Professional Services Market, 1991-1996* is your source of this factual, in-depth information. Find new ways of more deeply penetrating your existing markets and new opportunities that are just opening up.

Don't spend all those man-hours (and money) trying to gather this information yourself. Order this fact-packed report today!

This report is approximately 140 pages and has 76 exhibits. I have attached a detailed summary of the contents of the report for your review—and an order form for your purchase.

Sincerely yours,

Doug Tayler
Vice President

P.S. Save $300 by ordering this report by January 30, 1992. I look forward to hearing from you.

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 6. Logicon, Inc.

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B -1 Professional Services User Expenditure Forecast by Delivery Mode, 1990-1996
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YES! I want INPUT's report, *U.S. Professional Services Market, 1991-1996.*

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Dear Colleague:

If you face less growth than you planned this year, INPUT can help you identify the most promising opportunities in your market that will reap increased revenue and earnings in 1992.

Find out which industries will be increasing their budgets for your services—and why. All the economic and financial upheaval churning U.S. business enterprise is affecting the growth of processing and network services. Budgets for outside services have been delayed or eliminated as companies tightened their belts against slow recovery and increased competition.

INPUT's in-depth understanding and analysis of the market forces is at your disposal in these two reports:

- *U.S. Processing Services Market, 1991-1996*
- *U.S. Network Services Market, 1991-1996*

These reports provide valuable information on where you can extend your skills into new service delivery areas that are profitable. They tell you what markets to avoid. And they examine what your customers and prospects are really looking for.

Use this information for your market and strategic planning during 1992 and beyond. I have included summaries of the table of contents and list of exhibits from each of the reports for your review.

To order either or both reports, please complete and mail or fax the enclosed form. If you need your report immediately or would like more information about these or other INPUT reports and services, give me a call at (415) 961-3300.

Sincerely yours,

Doug Tayler
Vice President

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U.S. Processing Services Market, 1991-1996

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 2. Anacomp, Inc.
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 4. Comdisco Disaster Recovery Services, Inc.
 5. First Financial Management Corporation
 6. Litton Computer Services
 7. Shared Medical Systems Corporation

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U.S. Processing Services Market, 1991-1996

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U.S. Network Services Market, 1991-1996

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- Turnkey Systems
- Applications Software Products
- Systems Operations
- Systems Integration
- Professional Services
- Network Services
- Systems Software Products

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Network Services
User Expenditure Forecast by Market Sector, 1990-1996
($ Millions)

Market Sectors	1990 ($)	Growth 90-91 (%)	1991 ($)	1992 ($)	1996 ($)	CAGR 91-96 (%)
Delivery Mode Total	8,089	16	9,350	10,782		
Vertical Industry Markets	4,955	14	5,627	6,649		
Discrete Manufacturing	69	25	86	109		
Process Manufacturing	696	19	825	97		
Transportation	270	11	300			
Utilities	26	8	28			
Telecommunications	93	18	1			
Retail Distribution	155	21				
Wholesale Distribution	221	24				
Banking and Finance	740	15				
Insurance	208					
Health Services	446					
Education	163					
Business Services	548					
Federal Government						
State and Local Gov't						
Miscellaneous						

User expenditures for each of the eight information service categories are also forecasted by major industry sector and cross-industry sector.

15 Industry Sectors

- Banking and Finance
- Discrete Manufacturing
- Process Manufacturing
- Insurance
- Transportation
- Medical
- Utilities
- Education
- Telecommunications
- Federal Government
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- Retail Distribution
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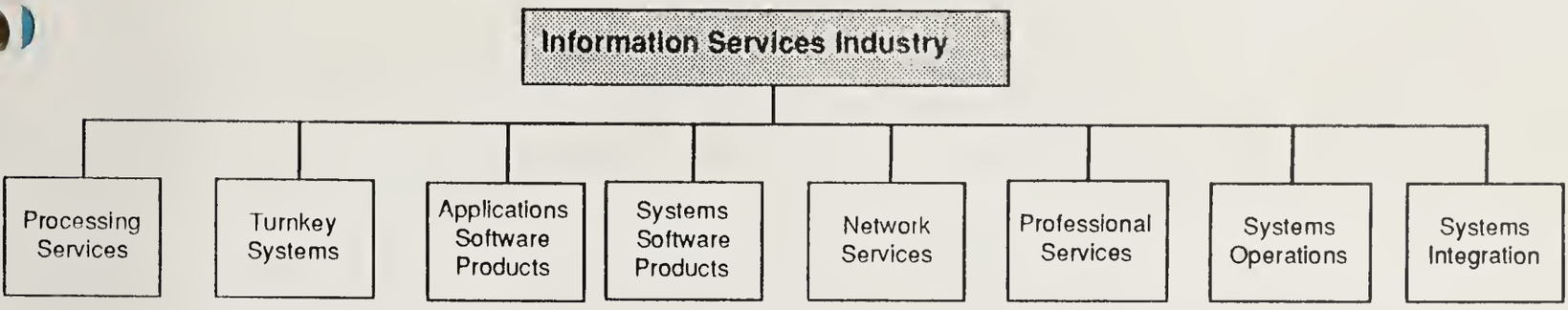
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Information Services Industry Structure—1991-1996



7 Cross-Industry Sectors

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12. Wholesale Distribution
13. Education
14. Business Services

Report Highlights

I. Introduction
- Industry sector analyzed relative to business, technology, and market factors affecting the sector

II. Trends, Events, and Issues
- Driving and inhibiting forces, industry trends, summary of issues and opportunities

III. Information Systems Environment
- Industry sector in terms of the users' perspective

IV. Information Services Market Forecast
- Size and growth of the industry sector by delivery mode and submode

V. Competitive Environment
- Specific competitive issues affecting the industry sector, with market share analysis and vendor profiles

VIII. Conclusions and Recommendations
- Special niches within the industry sector from the users' perspective

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U.S. Information Services Industry Forecast by Industry Sector, 1991-1996

Market Sector	CAGR 1991-1996 (%)
Telecommunications	16
State & Local Government	16
Retail Distribution	14
Medical	13
Process Manufacturing	13
Discrete Manufacturing	12
Federal Government	12
Utilities	12
Insurance	12
Wholesale Distribution	12
Business Services	10
Bankjing & Finance	11
Education	11
Transportation	10
Other Industry Sectors	7

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Systems Integration	21
Applications Software Products	20
Processing Services	15
Network Services	19
Processing Services	15
Professional Services	15
Systems Operations	13
Turnkey Systems	12
TOTAL SECTOR	16

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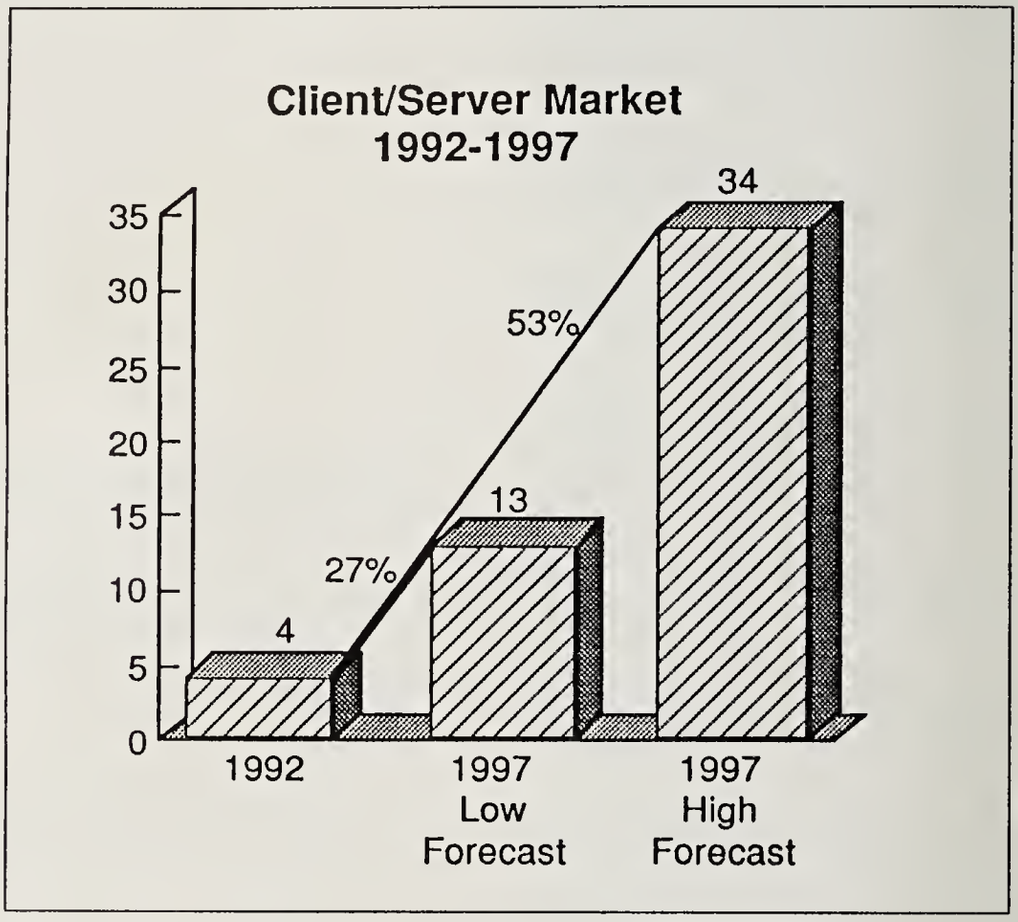
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- What are users' experiences with client/server architectures?
- When are client/server architectures cost effective?
- Which makes the most sense—upsizing or downsizing to client/server?
- What concerns do users have and how should client/server be positioned to customers?
- What are the client/server strategies of leading vendors?

...All questions that *must* be answered to capitalize on this rapidly expanding technology.

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Fax (415) 961-3966

Dear Colleague:

How do you define "client/server" architecture? What does it really mean to your company and how will it impact your customers? As a software, systems or services vendor, can you confidently answer these questions?

- **Why are client/server architectures inevitable?**
- **How large is the market for client/server computer equipment, software and services and how fast will it grow?**
- **What kinds of companies are implementing client/server architectures first?**
- **How long will it take users to learn to use and support client/server architectures?**

INPUT's new report, *Client/Server Applications and Markets,* analyzes the factors influencing the growth of the market and provides insight on the changes client/server computing will bring about from both the user and the vendor points of view. The report puts client/server into perspective by analyzing its benefits as well as its drawbacks. And INPUT includes both the user and vendor perspectives.

This report is *must* reading for managers and executives planning client/server marketing strategies. Use it to help you define your business plans. Make sure your thinking is on target by studying the conclusions of this report.

Best Regards,

R. Dennis Wayson
Vice President

P.S. This report is also available as part of INPUT's U.S. Information Services Market Analysis Program. For more information on this report or the program, please call me directly at (415) 961-3300.

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INPUT assists technology-aggressive organizations to maximize their investments in downsizing architectures and applications.

About INPUT's report, Client/Server Applications and Markets, 1992-1997...

Please send me the report for $2,245 ($2,495 after July 31, 1992)— California Clients: Please add applicable sales tax on 70% of the purchase price.

- ☐ Purchase order number _____
- ☐ Check enclosed
- ☐ American Express card # _____ exp. _____

Signature _____

- ☐ Please bill me ☐ Please bill my company

- ☐ *I'd like to see more. Please send me the report Abstract and Table of Contents.*
- ☐ *I have questions about how the conclusions pertain to my business. Please contact me.*

***About INPUT's services,** please keep me informed of future studies on:*

- ☐ Outsourcing ☐ Systems Integration ☐ Downsizing ☐ IS Market Forecasts
- ☐ *I'd like information on INPUT's Outsourcing and Systems Integration conferences.*

I'd like information on INPUT's other studies on downsizing...

- ☐ *Putting Downsizing in Perspective*
- ☐ *Systems Architectures for Downsizing*
- ☐ *Open Systems Opportunities*
- ☐ *Case Studies in Downsizing*

Keep us informed...

- ☐ *My responsibilities have changed. Please direct future information to:*

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Key Benefits

Vendors

Develop your market plans using an authoritative forecast

- Assess timing and extent of client/server architectures over the next five years

Know your target market

- Understand users' concerns about client/server architectures and the benefits they seek

Users

Invest wisely in applications that offer significant payoff

- Be more informed—for your management and the people you support
- Decide where, when and how to implement
- Understand the pitfalls as well as the opportunities

Who Needs this Information

- Information systems managers in all industry sectors
- Executives of information systems vendors, including software, hardware and services companies
- Marketing, product and strategic planning managers within information systems vendors

About this Report...

This report is based on interviews with executives like yourself...

- Interviews with IS users in a variety of company sizes and industry sectors
- Interviews with applications and systems software products vendors, systems integrators and hardware vendors.

In other words, INPUT draws conclusions on the market and makes recommendations, not based on the opinion of an isolated analyst, but on an authoritative primary market research study. Learn what your peers in the industry are saying about client/server before making your plans and setting your strategies.

And vendors need to seek out initial markets where productivity improvements are easily obtainable.

Related INPUT reports include:

- *Open Systems Opportunities*
- *Putting Downsizing in Perspective*
- *Case Studies in Downsizing*
- *Systems Architectures for Downsizing*

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Since 1974, INPUT has compiled the most extensive research base available on the worldwide information services market and its key segments, providing detailed market forecasts, vertical industry sector analysis and forecasts and analysis of vendor strategies and products. INPUT delivers specific expertise in the fast changing areas of outsourcing, systems integration, EDI/electronic commerce, software development/CASE, and the impact of downsizing.

Consulting services are provided by more than 50 professionals in major international business centers. Clients retain INPUT for custom consulting/ proprietary research, subscription-based continuous advisory programs, merger/ acquisition analysis and detailed studies of U.S. federal government IT procurements.

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Dear Colleague:

If you're wondering why information services sales to the banking and finance industry have not met your expectations, INPUT's new report, *Information Services Opportunities in the Financial Services Industry*, can help you chart a course to increased revenues and earnings in 1992.

INPUT's in-depth understanding of the trends, events and issues affecting the financial services industry, and the technologies and pressures driving the internal information services (IS) environment which supports it, will help you identify the product and service opportunities which can offer competitive advantage and increased market share.

Understand the driving and inhibiting forces which influence user buying decisions, note what the significant vendors to this market are doing, and study the historic expenditures and projected spending patterns for seven service delivery modes, including processing services, network services, applications software products, professional services, systems integration, systems operations and turnkey systems.

Use this information for your market and strategic planning during 1992 and beyond, and, because INPUT updates this report yearly, you can be confident that you can always obtain the latest information upon which to base critical business decisions. Enclosed is a summary of the Table of Contents and a brochure which further describes this important report.

Get the jump on your competition! **Order before June 15, 1992 and save 10% off** the published purchase price. Please complete and mail or fax the enclosed form, or call us direct for immediate delivery.

Sincerely yours,

G. Christopher Smith
Vice President, Marketing and Sales

P.S. This report is also available as part of INPUT's U.S. Information Services Market Analysis Program. For more information on this report or the program, please call Mark Drisko or Paul Kendrick at (415) 961-3300.

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The Financial Services Industry

There's a Better Day A'Comin' ... But When? And How Much Better?

INPUT's New Industry Report Shows That Change and Cautious Growth Can Offer Opportunity

- Discover how business, industry and technology trends drive the use of information services in the banking and finance industry
- Learn how the banking and finance industry uses information systems
- Identify the major issues challenging banking and finance industry information services organizations
- Understand the information services market within the banking and finance industry, including market size, and driving and inhibiting forces
- Study the competitive environment and identify leading information services vendors to the banking and finance marketplace

INPUT Provides You With Essential Information on the U.S. Financial Services Industry

Plan successful product and marketing strategies

Identify new opportunities

Understand your competition

Get the answers to questions such as:

- From what services do vendors derive most of their revenues?
- What are the vendors' special skills, and how do they leverage them to succeed in a tightened economy?
- What new products/ services are being offered to capitalize on niche market opportunities?

The banking and finance industry continues to react to the economic uncertainties and competitive pressures of the 1990s. A variety of legislative and other market forces have combined to define a market where all agree that better times will come—but how much better and when?

INPUT will help you understand the forces and pressures shaping this industry with its new report, *Information Services Opportunities in the Financial Services Industry.* For vendors and users of information services in the banking and finance industry, making the right decisions now can lead to long-term competitive advantage as the industry stabilizes.

Information Services Trends and Issues—Where Are *Your* Opportunities?

Banking and finance is the largest sector of the information services industry, and one of the most challenged by the current economic and business climate. INPUT's assessment of the trends and issues affecting this market, as a whole and by delivery mode, identifies your most promising opportunities through 1997. INPUT's analysis of industry driving and inhibiting forces addresses questions such as:

- **Delivery Mode Trends**—Which segments within the banking and finance industry are buying services using which delivery modes?
- **Developing Technologies**—How are developing technologies both inhibiting and driving vendor opportunities?

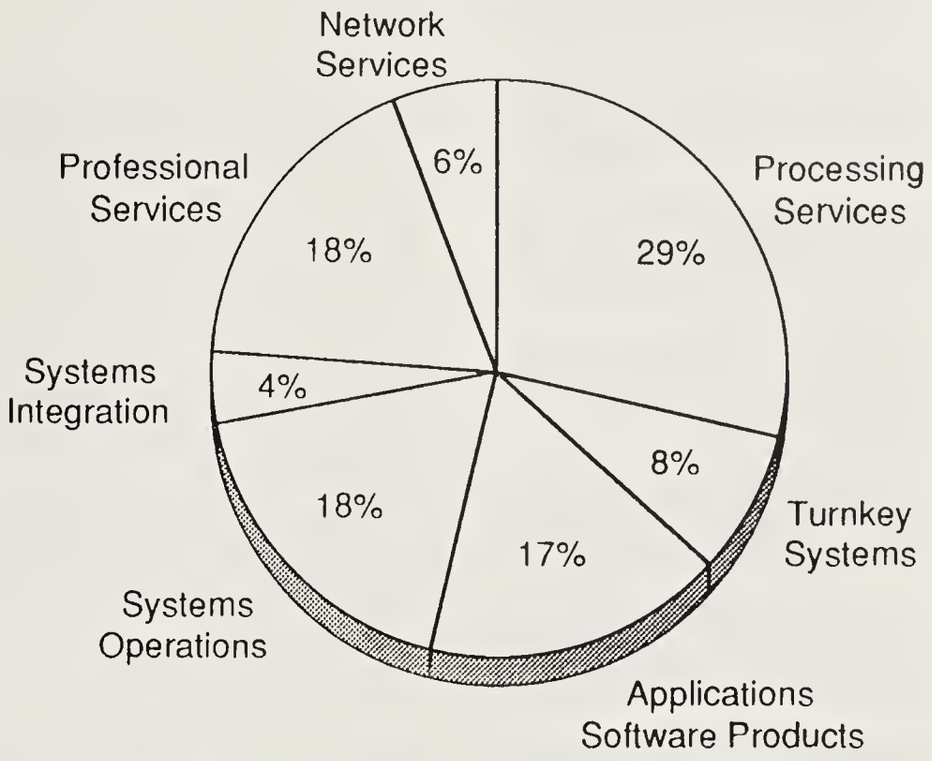
 How has competition among banks fueled the use of technologies such as RDBMS?
- **Government Regulations**—How are commercial banks and S&Ls, as opposed to non-bank financial institutions, being affected by government regulations?

 How will the government's requirement for commercial banks and S&Ls to raise their capital ratios affect processing services and systems operations vendors?
- **Bank Mergers and Acquisitions**—

 How will consolidation in the commercial banking industry affect the market for processing services and professional services?

INPUT's report clearly outlines and defines the significant issues facing vendors and users of information services in the banking and finance industry. It identifies the questions that should be asked and situations that should be addressed in developing successful business strategies for both vendors and users.

Banking and Finance Sector Information Services Market by Delivery Mode 1992



Market Forecasts

INPUT's market forecast for the banking and finance industry as a whole, and for its seven delivery modes, provides excellent insight into the current health of the industry and where it will stand in 1997. Aside from providing growth rates and revenue projections for the five-year period 1992-1997, INPUT's report analyzes each delivery mode separately, explaining how various market forces will impact the delivery of:

- Processing Services
- Turnkey Systems
- Applications Software Products
- Systems Operations
- Systems Integration
- Professional Services
- Network Services

Know Your Competition

A wide variety and large number of information services vendors serve the banking and finance industry, and there is no pattern of market control. Leading vendors are both bank-industry specialists and multi-industry vendors. INPUT's discussion of prominent vendors and their product and marketing strategies provides not only competitive information, but also invaluable insight into what market niches may provide significant growth opportunities over the near and medium terms.

Stability in a Changing Market

An economy emerging from a recession is often typified by cautious growth, and reduced opportunities for vendors in most industries. The banking and finance industry is no different.

Now more than ever, vendors need to establish market strategies, and identify areas of significant market potential, so they will have a competitive edge as the market picks up. To do this, they need thorough, up-to-date market intelligence—the kind of information INPUT's new report provides.

In a changing market, you need to drive a stake in the ground. You can do this with INPUT's report, *Information Services Opportunities in the Financial Services Industry.* Order your copy today.

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About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

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- How do vendors price and market their professional services offerings?
- What are their profit margins?
- What discounts are offered?
- When are premiums charged?
- How do buyers of professional services choose a vendor?
- Which service attributes are important, and which are not?
- Are buyers price sensitive?

INPUT provides the answers in:

Pricing and Marketing Professional Services in the 1990s

Professional Services Vendors: Read this story...
Is this story a familiar one?

Your company has a great opportunity...

Your account executive has a strategy...

Your V.P. of Marketing has another.

Who's right?

Don't make these critical decisions on "gut feel".

Get the facts.

See what buyers of professional services say.

Your company has an outstanding opportunity to provide professional services to a real blue chip company... an account that you've wanted to crack for years. Getting in the door now will mean an opportunity to establish a long-term business and leverage a variety of other offerings. As you prepare your proposal and presentation to the client...

Your Account Executive wants to lower the fee for your service. "Use it as the loss leader... it's our foot-in-the-door to future business! This is a tough economy, and price will be a critical factor."

Your Senior Marketing Executive insists that the scope of your proposal be expanded to show greater capability and differentiation. "Make sure our company name, reputation, and broad service portfolio, and strength in the market, our client base and experience are emphasized! Clients will buy this over a lower fee."

Who has the right strategy? How do clients of professional services vendors make buying decisions in today's competitive market?

INPUT answers these questions in a comprehensive study on this issue, and the results can change the way you do business. Use it to examine your marketing and sales strategies, and create a business development strategy based upon what buyers *say* they value, not what individuals in your organization might *think* they value based on "gut feel".

Base Your Strategy on Primary Market Research

INPUT interviewed 50 users of professional services with annual business revenues of $100 million or more for this study to understand their buying patterns, values, and perceptions of vendor offerings. INPUT also interviewed more than 30 vendors of professional services, with revenues between $3 million and $1.8 billion, to gain an understanding of their current marketing strategies and pricing practices.

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Dear Colleague:

As hardware becomes a market commodity, vendors increasingly are focusing on adding professional services to the mainstream of their product line. And for good reason: professional services are in demand, the market is growing, and it offers the opportunity to differentiate a vendor's services from competitive offerings.

But what are the best strategies to follow in marketing and pricing professional services in the 1990s? How can revenue be increased and profits maximized? Do you know...

- **What are typical vendor profit margins?**
- **What salary multiples are used to determine billing rates?**
- **What are typical staffing profiles?**
- **When premiums are applied, how much is charged?**
- **What are the most effective differentiation strategies?**

There's only one way to get such critical information... and that's through INPUT's latest research study, *Pricing and Marketing Professional Services in the 1990s*. After interviewing over 50 active buyers of professional services and 29 vendors, INPUT obtained the information necessary to draw objective conclusions... the kind that can make the difference between your success and failure in today's competitive marketplace.

Give yourself the objective data necessary to set a winning strategy. Invest in the future of your company. We look forward to providing you with this important report.

Sincerely yours,

John McGilvray
Program Manager

P.S. **Save $250.** Order this report by August 14, 1992 for the special price of $2,245. Call Glenna Nathans at (415) 961-3300... or use the enclosed fax reply sheet.

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INPUT provides clients with critical information and objective analysis to develop strategies for marketing and pricing professional services.

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Develop targeted strategies for one of today's hottest growth markets

On a scale of 1 to 5, how do users rate vendor attributes when making buying decisions for professional services? What's most important? Least important?

You may be surprised at the answers... learn this and much more in INPUT's latest report, *Pricing and Marketing Professional Services in the 1990s.*

Users' Selection Criteria for Vendors	
What's important to buyers?	• Prior relationship? • Identifiable skill set? • Knowledge? • On-time completion? • Price? • Name? • Size?

This is just a sample of more than 50 exhibits in this comprehensive, first-of-its-kind report.

Vendor Benefits

Increase your professional services revenues by identifying...

- Buyer needs for professional services, both near- and long-term
- User experiences with professional services—what they do and don't like
- How businesses make build or buy decisions
- How buyers select vendors
- The importance of price in the vendor selection process

Vendors... Use this report to understand buyer motivation and competitive positioning

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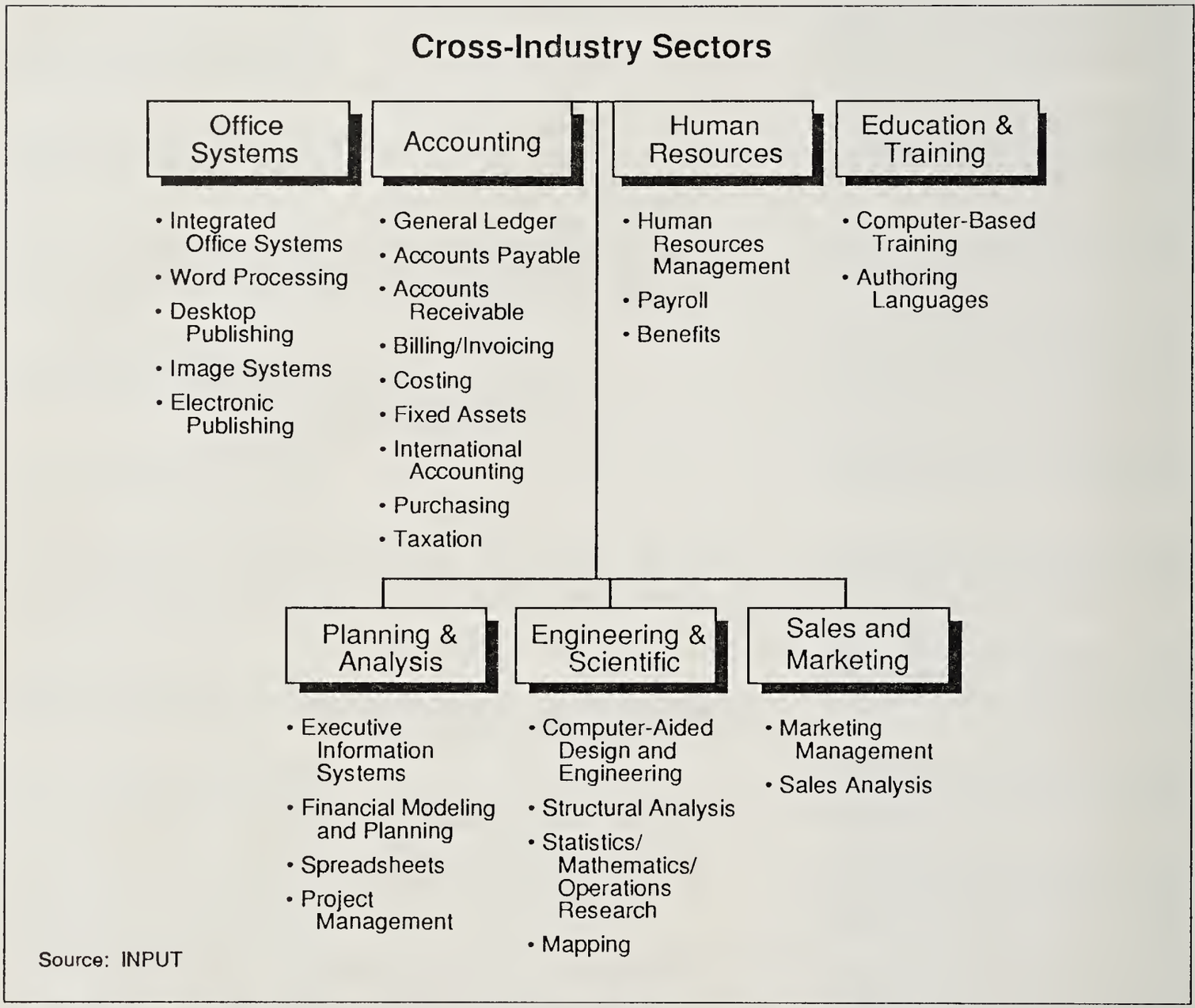
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Cross-Industry Markets: At a Crossroad?

- Understand the seven business functions common to *every* industry
- Discover why cross-industry expenditures are down and will stay that way
- Learn why reduced expenditures don't necessarily mean reduced revenues for information services vendors

Information Services Is Being Challenged In Every Cross-Industry Market!



Understand the Cross-Industry Marketplace

Seven separate, but interrelated business activities:

- Office Systems
- Accounting
- Human Resources
- Education and Training
- Planning and Analysis
- Engineering and Scientific
- Sales and Marketing

5-Year Market Forecast

Define your strategy by knowing where the money is.

By delivery mode -

- Applications Software
- Turnkey Systems
- Processing Services

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Understand the Challenge

Plan for the impact of the recession, downsizing, and client/server technology on cross-industry markets.

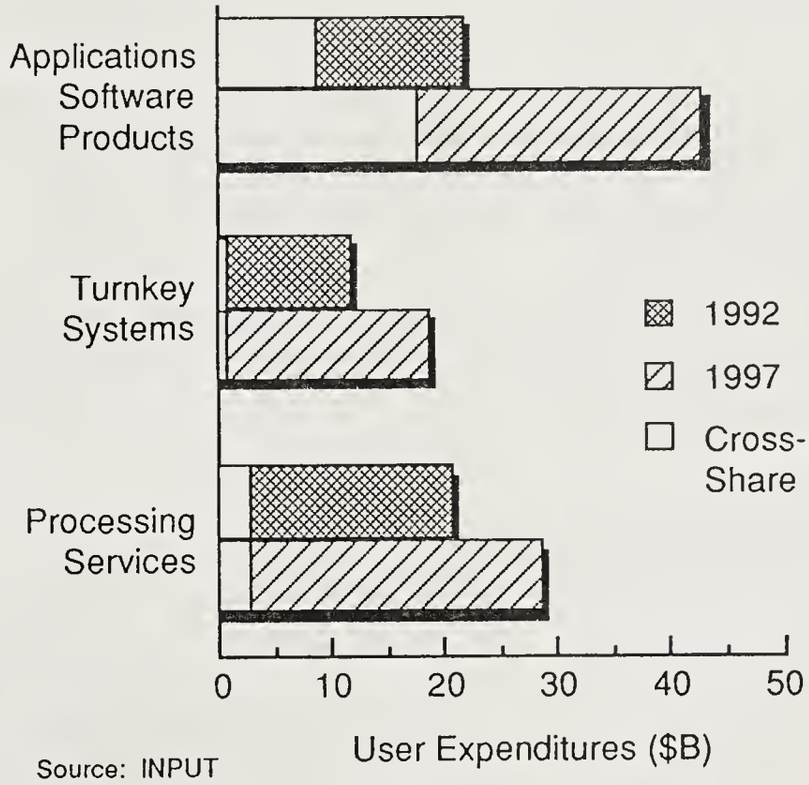
Seize the Opportunity

Don't guess at your market strategies.

Know

- Projected IS budgets in this market
- Who makes cross-industry purchase decisions
- Who the leading vendors are in cross-industry markets, and how that's changing
- How corporate IS is approaching technological change

Cross-Industry Sectors' Share of Delivery Mode Expenditures, 1992-1997



Source: INPUT

Report Features

INPUT's New Report, ***Information Services Opportunities in Cross-Industry Markets, 1992-1997***, comes in two versions to meet your needs.

- The full report, covering all seven industry sectors
- Separate sector reports, each covering one of the seven market sectors

For each market sector, INPUT considers:

- Definitions
- Information services markets
- User department directions
- Trends/technology ratings of importance
- Vendors and the competitive environment

Order your copy of INPUT's new report, *Information Services Opportunities in Cross-Industry Markets, 1992-1997*, today.

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U.S. Information Services Market Analysis Program

Analyzes the information services industry in the United States—

- Analysis of customer needs
- Market size and growth by industry, cross-industry, and product/service
- Competitive information—leading vendor profiles, market positioning, and strategies
- Impacts of downsizing, outsourcing, economy, networking, open systems, and re-engineering

INPUT's European offices offer a full complement of research and subscription services focused on the European markets.

Custom Consulting

INPUT conducts over 100 primary research studies for clients every year, many focused on downsizing topics. These have included analysis of product introductions, marketing strategies, competitive analysis, and vendor merger/acquisition study. For users, INPUT has evaluated specific applications, costs of downsizing, vendor evaluation, and the potential for outsourcing.

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Discrete and Process Manufacturing—

What Are the Information Services Opportunities?

- Understand the challenges of these core industries as they struggle to compete in a global market.
- Identify the effects of the recession, regulatory actions, and competition.
- Identify *your* information services opportunities in this marketplace.

All this, and more, is contained in INPUT's two new 1992 industry reports,

Information Services Opportunities and Trends, 1992-1997

Position Your Business to Take Advantage of New IS Opportunities

Information Services Trends and Issues — What are Your Opportunities?

Discrete manufacturing is one of America's core industries—the backbone of the American economy.

INPUT's assessment of the trends and issues affecting this market, as a whole, and by delivery mode, pinpoints your most promising information services opportunities through 1997.

Discrete Manufacturing—

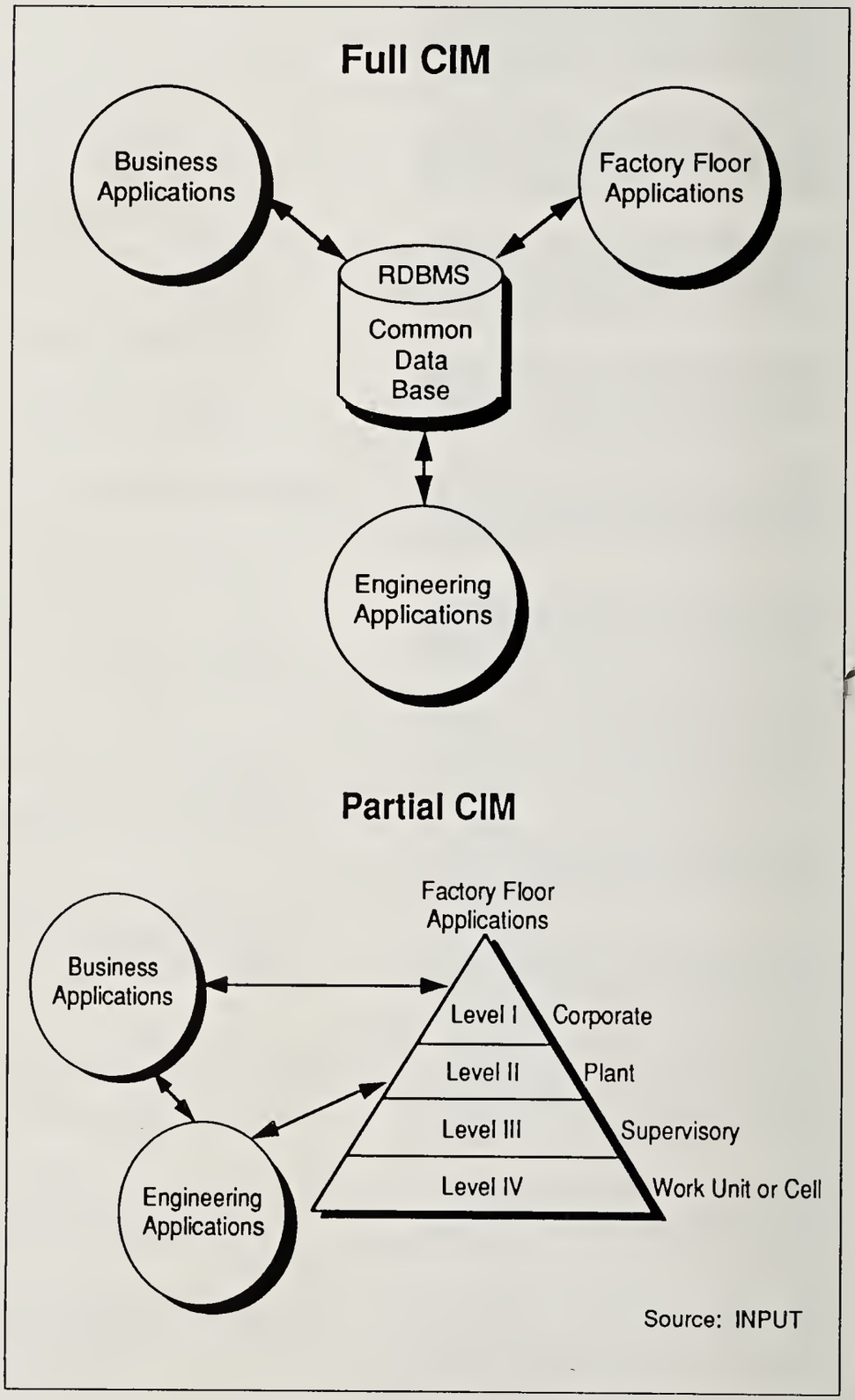
Understand the key needs driving the use of information services:

- **More interconnection**
- **Access to data**
- **Downsizing**
- **Client/server**
- **Costs**

Convert needs into business opportunities:

- **Plan successful product strategies.**
- **Identify new opportunities.**
- **Understand your key competitors.**

Develop effective competitive strategies by identifying key competitors and understanding their strengths and weaknesses.



Understand the differences between full and partial CIM implementations and what that means to services vendors.

Information You Need in These 2 Reports

Competing in the Revolution

In today's highly competitive marketplace, **knowledge of your market is absolutely key to survival.** INPUT's two manufacturing industry reports provide industry and market intelligence, which vendors can use to gain competitive advantage.

As the economy, world markets, regulatory activity, technology, and other key factors change, now more than ever, vendors need to establish market strategies and identify areas of significant market potential. Don't accept less of the market than you deserve because you didn't have all the data.

Market Forecasts

Each of these industry reports, *Process Manufacturing* and *Discrete Manufacturing*, provides detailed market forecasts for:

- **Processing Services**
- **Turnkey Systems**
- **Applications Software Products**
- **Systems Operations**
- **Systems Integration**
- **Professional Services**
- **Network Services**

INPUT provides revenue projections for each of these market segments for 1992 through 1997 and identifies CAGRs for each delivery mode.

Key Report Data

Each report offers a structured, concise examination of...

- **Current trends, events, and issues**
- **The information systems environment**
- **The information services market**
- **The competitive environment**

...and offers conclusions and recommendations supported by detailed revenue forecasts.

Process Manufacturing —

Understand the forces that have been driving the key sectors of the processing services industry:

- **Chemicals**
- **Petroleum**
- **Paper and pulp**
- **Food and beverage**

Identify key applications areas for process manufacturers and focus your products and services on these markets of opportunity.

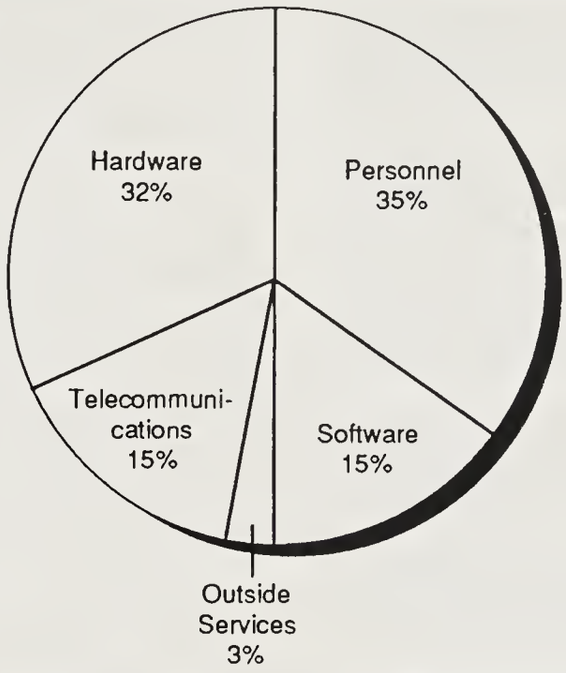
Delivery Mode Trends: Which segments within the processing services industry are buying services in which delivery modes?

Developing Technologies: How are new technologies both inhibiting and driving vendor opportunities?

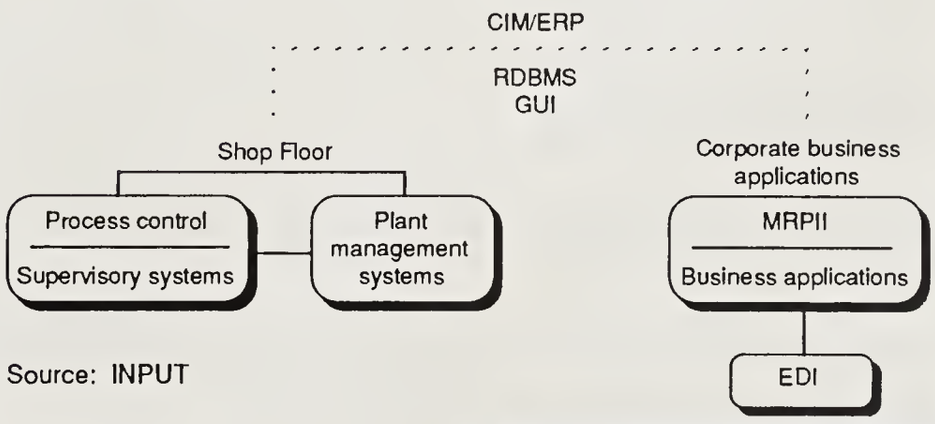
Regulatory Concerns: How is the growing burden of regulatory constraints affecting the processing services industry? Does this trend offer information services opportunities?

IS Budgets: Where is the IS function spending its budget dollars?

IS Expenditures in Process Manufacturing



IS Applications in Process Manufacturing



Source: INPUT

Call, fax, or mail

your order

to your nearest

INPUT office

U.S. Information Services Market Analysis Program

Analyzes the information services industry in the United States—

- Analysis of customer needs
- Market size and growth by industry, cross-industry, and product/service
- Competitive information—leading vendor profiles, market positioning, and strategies
- Impacts of downsizing, outsourcing, economy, networking, open systems, and re-engineering

INPUT's European offices offer a full complement of research and subscription services focused on the European markets.

Custom Consulting

INPUT conducts over 100 primary research studies for clients every year, many focused on downsizing topics. These have included analysis of product introductions, marketing strategies, competitive analysis, and vendor merger/acquisition study. For users, INPUT has evaluated specific applications, costs of downsizing, vendor evaluation, and the potential for outsourcing.

About INPUT

INPUT is a worldwide consulting and market research firm uniquely focused on the information technology services and software markets. Executives in many technically advanced companies in North America, Europe, and Japan rely on INPUT for data, objective analysis, and insightful opinions to support their business plans, market assessments, and technology directions. By leveraging INPUT's considerable knowledge and expertise, clients make informed decisions more quickly and benefit by saving on the cost of internal research.

Most clients have retained INPUT continuously for a number of years, providing testimony to INPUT's consistent delivery of high-value solutions to complex business problems. To find out how your company can leverage INPUT's market knowledge and experience to gain a competitive edge, call us today.

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INPUT®

Industry Sector and Cross-Industry U.S. Information Services Market Analysis Program

Analyzes the information services industry in the United States.

REPORTS

Vertical and Cross-Industry Market Reports (1992-1997)

- *Discrete Manufacturing*
- *Process Manufacturing*
- *Transportation*
- *Utilities*
- *Telecommunications*
- *Retail Distribution*
- *Wholesale Distribution*
- *Banking and Finance*
- *Insurance*
- *Health Services*
- *Education*
- *Business Services*
- *Federal Government*
- *State & Local Gov't*
- *Miscellaneous Industries*
- *Accounting*
- *Education & Training*
- *Engineering & Scientific*
- *Human Resources*
- *Office Systems*
- *Planning & Analysis*

Market Forecast Book and Data Base	Annual forecasts for all market sectors in printed and diskette format, including systems integration and systems operations.
Research Bulletins	Regular reports on INPUT research findings and analysis of important industry announcements, trends, and issues.

SERVICES

Telephone Inquiry	Use the "hotline" to obtain answers to your immediate questions.
Access to INPUT Consultants	Obtain opinions and advice from INPUT executives and consultants from meetings, mail, fax, and the telephone.
On-Site Visit	Discuss your issues and concerns, introduce experts to your organization, and obtain presentations on industry trends.
Conference	Review the state of the industry and network with executives from other INPUT clients.

INPUT®

Industry Sector and Cross-Industry U.S. Information Services Market Analysis Program

BENEFITS

Be aware of the trends when they first appear. Understand the impacts of market change. Capture new market opportunities. Support market strategy changes. A single source of information services market research. Save your own and your staff's time by utilizing INPUT's consultant access and hotline service.

PROGRAM DESCRIPTION

For industry-specific markets such as insurance or discrete manufacturing, and for cross-industry markets such as accounting and office systems, INPUT analyzes the underlying trends and issues, the directions, and growth rates of the individual sectors that serve the specific industry. Each report provides in-depth analysis of a major sector of the U.S. economy as it relates to the acquisition and use of information services and software products, the latest five-year forecast, and analysis of leading vendors and competitive strategies.

RELATED INPUT PROGRAMS

Information Services Industry Market Analysis Programme—Europe

Information Services Vendor Analysis Program provides profiles and capabilities analyses of information services vendors.

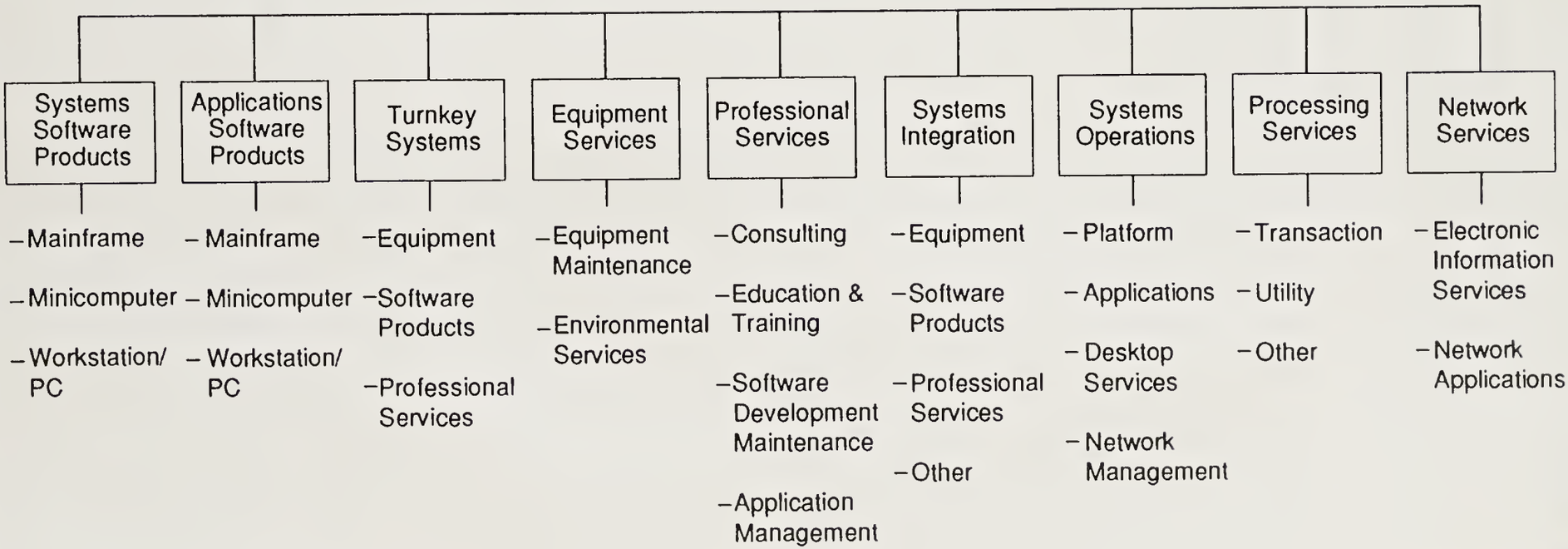
Outsourcing Information Systems Programs (U.S. and Europe) provide research on the revolution in systems operations, network operations, applications management and desktop services opportunities.

Systems Integration Programs (U.S. and Europe) analyze opportunities for vendor-provided solutions to complex information systems, communications, and automation requirements.

EDI and Electronic Commerce Program examines the marketing, competitive, and economic issues of the movement from paper to electronic-based commerce.

Custom Research and Consulting Services satisfy unique needs for market research, competitive analysis, IS strategy development, acquisition support and other tasks based on INPUT's extensive experience and information resources.

Information Services Industry Structure



Source: INPUT

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Industry Sector and Cross-Industry U.S. Information Services Market Analysis Program

CLIENT SUPPORT SERVICES

Clients gain maximum benefit from the industry research and consulting services available to them through the development of a strong, continuous relationship with INPUT staff. Through frequent contact and sharing of opinions and ideas, you receive a flexible response to changing areas of interest and focus. INPUT provides the following specific services in order to build a full relationship:

Consultant Access	Continuous support from INPUT's consultants and executives who are available to share opinions and reactions to events, and to discuss ideas and challenges.
On-Site Presentation	INPUT consultants present and discuss research findings at your site. Research presentations can be tailored to focus on your needs. Discuss specific interests and issues in confidence. This presentation is an excellent method of distributing key information through the organization and of obtaining more uses of the research materials.
Conference	Gain a thorough understanding of the major trends within the information services industry—economic, technological, and structural. Evaluate the impacts on the market, its projected growth, leading vendors, and future directions. This conference focuses in particular on the downsizing revolution and its impacts on the industry.
Telephone Inquiry Service	Satisfies requirements for short-term research needs (less than two hours), and clarification/amplification of report and presentation data.
Site Subscriptions	Complete program services to additional sites at substantially reduced fees.

For more details please contact your nearest INPUT office.

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Industry Sector and Cross-Industry U.S. Information Services Market Analysis Program

REPORT DESCRIPTION

U.S. Information Services Industry Forecast Book, 1992-1997
This report, published at year end, contains all of the U.S. forecasts for the 9 delivery modes, 15 industry, and 7 cross-industry sectors as well as the industry as a whole. This report serves as a reference tool for subscribers.
A diskette, provided with the report, includes all of the forecast tables in spreadsheet format.

INDUSTRY SECTOR REPORT DESCRIPTIONS

U.S. Information Services Industry—Discrete Manufacturing Sector
This report evaluates the impact of trends in the discrete manufacturing sector on information services spending and use. The report provides detailed forecasts by type of service, identifies leading vendors and competitive trends, and analyzes the priorities of the information systems function in this industry.

U.S. Information Services Industry—Process Manufacturing Sector
For the process manufacturing sector the same analysis is provided. This industry has different priorities and spending patterns for information services and software products than does discrete manufacturing and warrants a separate review and report.

U.S. Information Services Industry—Telecommunications Sector
The telecommunications industry continues to undergo significant change through deregulation and increased price pressure. As the larger companies downsize, the need for information services is changing. This report analyzes the industry trends, provides forecasts and identifies opportunities.

U.S. Information Services Industry—Retail Distribution Sector
INPUT's report on retail distribution focuses on the impacts of competition and poor profitability on the use of information technology. The report provides the needed forecasts, competitive analysis and opportunity review to help information services vendors plan their strategies in this sector.

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Industry Sector and Cross-Industry U.S. Information Services Market Analysis Program

INDUSTRY SECTOR REPORT DESCRIPTIONS *(Continued)*

U.S. Information Services Industry—Banking and Finance Sector
INPUT's annual review of this largest segment of the information services industry looks at how the industry is restructuring and the impact this is having on the information systems environment. Banking and finance is leading the way in the outsourcing and re-engineering areas and aggressively looking for ways to contain IT spending. The report provides a detailed five-year forecast and analyzes key competitive trends.

U.S. Information Services Industry—Insurance Sector
The U.S. insurance sector is struggling with outsourcing, downsizing and constraining IT spending in a period of declining profitability. INPUT's report provides five-year forecasts, and identifies leading vendors and opportunities.

U.S. Information Services Industry—Health Services Sector
The health services industry is under immense cost and governmental pressure. INPUT's market analysis identifies how IT is being used to meet these challenges, provides detailed forecasts and identifies information services opportunities.

U.S. Information Services Industry—Other Industry Sectors
INPUT also provides analysis and market forecasts for the following additional industry sectors on an annual basis:

- Transportation
- Utilities
- Wholesale Distribution
- Education
- Business Services
- Federal Government
- State and Local Government
- Miscellaneous Industries

CROSS-INDUSTRY SECTOR REPORT DESCRIPTIONS

Many information services and software products offerings are not specific to a particular industry. They can be acquired and deployed successfully on a cross-industry basis. Two examples are general accounting systems and human resource (personnel) systems. INPUT separates these from the industry sector markets and forecasts them separately. The seven sectors are:

- Accounting
- Education and Training
- Engineering and Scientific
- Human Resources
- Office Systems
- Planning and Analysis
- Other

Industry Sector and Cross-Industry U.S. Information Services Market Analysis Program

RESEARCH BULLETINS

Research Bulletins are frequent, short reports that:

1. Present results from research studies as quickly as possible. These Research Bulletins communicate key findings on issues, trends, new developments and ideas, market forecasts, and vendor analysis.
2. Provide INPUT's analyses of important industry announcements, events, awards, and other activities. These Research Bulletins analyze the meaning of these activities rather than just give the news.

Research Bulletins already published that are provided immediately include:

- *Elusive "Year of UNIX" Revisited*
- *Architectural Considerations of Downsizing*
- *The IBM Reorganization: Viewed Through a Knothole*
- *The U.S. Distribution Market, 1991-1996*
- *Revolution or Evolution? The U.S. Information Services Industry in the 1990s*
- *Challenges and Potential of the U.S. Professional Services Market, 1991-1996*
- *Healthy Increase in Applications Software Products Budgets*
- *NCR/AT&T: A New Model of Computing?*
- *Sizing Up Downsizing*
- *Professional Services—Buyer Perspective*
- *Worldwide Information Services Market Forecast, 1990-1995*
- *Electronic Commerce: The New Foundation for Trade*
- *Public Information Services Vendors—1990 Performance*
- *UNIX—The User Perspective*
- *IBM Services Offerings: Field Empowerment*

1992
Industry Sector & Cross-Industry U.S. Information Services Market Analysis Program

Please enter my order as described:

Subscription to INPUT's customized Industry Sector & Cross-Industry U.S. Information Services Market Analysis Program at the fee of $19,500.

Travel expenses for on-site presentations are additional and will be billed separately.
California Clients: Please add applicable sales tax on 25% of purchase price.

TERM OF SUBSCRIPTION—The initial term of this subscription will be for twelve (12) consecutive months beginning _____. The subscription will automatically renew for each succeeding year unless INPUT receives written notice sixty (60) days prior to the start of each renewal period. The fees for INPUT services defined in this Agreement and its attachments will be invoiced each year at INPUT fees then in effect, due and payable on or before the start of the program subscription period.

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1991

INPUT'S INDUSTRY SECTOR AND CROSS-INDUSTRY U.S. INFORMATION SERVICES MARKET ANALYSIS PROGRAM

PLANNING STUDIES

- *(See Attached)*

CLIENT SERVICES

- RESEARCH BULLETINS

 Concise summations of research in process, breaking industry trends and changes in the market.

- TELEPHONE INQUIRY

 "Hotline" for short ad-hoc research needs on the U.S. Information Services Market. Twenty-four hours of hotline service for 1991 included in base-line subscription.

- ON-SITE VISIT

 INPUT executive presents research results/industry overview at your site (excluding travel)

- CLIENT CONFERENCE

 Two seats at INPUT's annual assessment of the industry, *San Francisco, CA October 7-8, 1991.* Additional seats available at two-thirds off the list price.

- INFORMATION CENTER ACCESS

 Client may visit and use INPUT's research libraries in Teaneck (Glen Pointe), New Jersey and/or Mountain View, California

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U.S. MARKET ANAYSIS INDUSTRY SECTOR REPORTS

1991 - 1996

For industry-specific markets such as insurance or discrete manufacturing, and for cross-industry markets such as accounting and office systems, INPUT analyzes the underlying trends and forecasts the directions and growth rates of the individual sectors that serve the specific industry. Each report provides in-depth analysis of a major sector of the U.S. economy as it relates to the acquisition and use of information services and software products, the latest five-year forecast, and analysis of leading vendors and competitive strategies.

INDUSTRY SECTOR REPORTS

Banking/Finance Sector, 1991-1996
Business Services Sector, 1991-1996
Consumer Services Sector, 1991-1996
Discrete Manufacturing Sector, 1991-1996
Education Sector, 1991-1996
Federal Government Sector, 1991-1996
Insurance, 1991-1996
Medical, 1991-1996
Miscellaneous Industries Sector, 1991-1996
Process Manufacturing Sector, 1991-1996
Retail Distribution Sector, 1991-1996
State & Local Government Sector, 1991-1996
Telecommunications Sector, 1991-1996
Transportation Sector, 1991-1996
Utilities Sector, 1991-1996
Wholesale Distribution Sector, 1991-1996

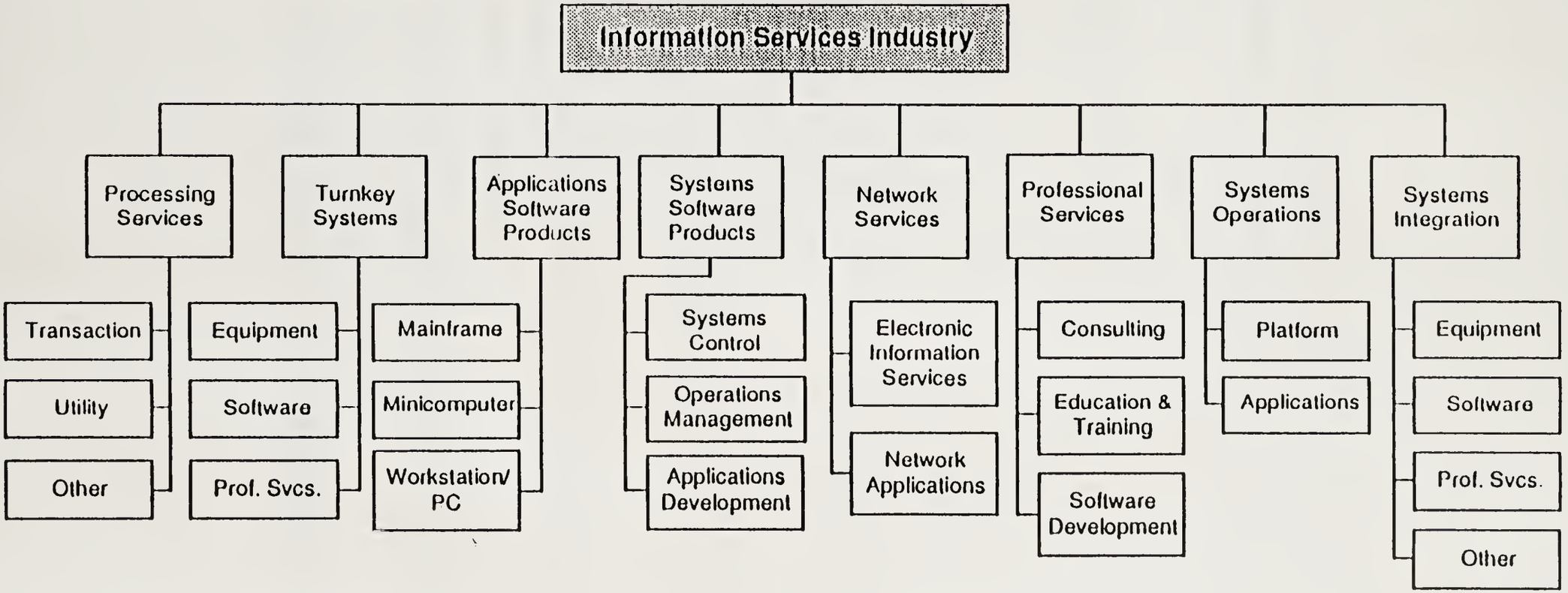
CROSS INDUSTRY REPORTS

Accounting Sector, 1991-1996
Education & Training Sector, 1991-1996
Engineering & Scientific Sector, 1991-1996
Human Resources Sector, 1991-1996
Planning & Analysis Sector, 1991-1996
Office Systems Sector, 1991-1996
Other Sector, 1991-1996

MARKET FORECAST BOOK AND DATA BASE

Annual forecasts for all eight market sectors in printed and diskette format (see attached Information Services Industry Structure)

Information Services Industry Structure—1991



Source: INPUT

INPUT®

1992 U.S. EXECUTIVE CONFERENCE

on the Information Services Industry



INPUT's Annual Information Services Executive Conference

Conference Objective

This is a revolutionary time in the IT industry. It is revolutionary in the sense that the effects of change are virtually unpredictable and the changes are happening fast. The revolutions are:

- Downsizing
- Outsourcing
- Networking
- Re-engineering

They are interlinked

The conference objective is to galvanize attendees to take action now so that their organizations can at least survive and hopefully prosper in these tumultuous times. Both users and vendors must make choices now; this conference will help make these choices.

Who Should Attend

Users:

IT, corporate planning and operations executives and managers responsible for evaluating and deciding the direction for IT in their organizations. Those who must address the issues of downsizing, outsourcing and networking. Executives who seek a new balance for the make/buy equation in their organizations.

This will also be valuable to executives who wish to use corporate assets to enter the information services business.

Vendors:

Executives, planners, and managers who must recommend or decide on the direction the company will take in view of the unprecedented change in market conditions and competition. It will particularly appeal to those with vision to see the opportunities and the threats inherent in revolutionary times.

Why You Should Attend

This conference will allow you to more effectively:

- Address the challenge of IT downsizing, outsourcing, and networking
- Formulate strategic and tactical plans
- Evaluate current investment programs in view of the new paradigms
- Obtain fact-based opinions for immediate use
- Qualify the opportunities in the new IT world
- Determine the threats to existing business
- Avoid the problems of the new IT environment
- Communicate to your organization the urgency needed to change
- Stimulate peers and executives
- Examine your competitive position
- Realistically assess where your efforts should be placed

Key Issues Addressed

- What will the IT vendor community look like over the next five years?
- What will happen to the relationships among IT vendors, IS departments and users?
- How will downsizing and outsourcing change the industry and how fast?
- Where are the threats and the opportunities in downsizing and outsourcing?
- On a market-by-market basis, what will happen over the next five years?
- What should you do now, today, about these revolutions?

Competing in a Revolution!

SUNDAY, NOVEMBER 1

5:00 PM - 7:30 *Reception*—Hosted by Peter A. Cunningham, R. Dennis Wayson, G. Christopher Smith, and Nancy A. Hill, INPUT, at the Fairmont Hotel. Please join us and your colleagues to network with your peers.

MONDAY, NOVEMBER 2

8:00—Registration—Continental Breakfast

8:30—Welcome

8:45—Strategies for Dealing with Revolution in the IT Industry —Peter Cunningham, President of INPUT will discuss the revolutions that are changing the IT industry, particularly those related to its structure and the role of IT in user organizations.

9:45—Break

10:15—Downsizing—Impact on the IT Industry—R. Dennis Wayson, INPUT Vice President, will show how the IT world will be affected over the next five years.

11:15—A Radical Shift in the Software Paradigm—Thomas O'Flaherty, INPUT Vice President in charge of CASE and application development consulting, will discuss how software is changing in a downsized world.

12:15—Lunch

1:30—Software Downsizing—The Disappearance of *Software Product* Companies? —John McGilvray, INPUT Principal Consultant and Manager of the Information Services Market Analysis Program, will discuss the potentially devastating effect on the software products industry of the downsizing phenomenon.

2:30—Break

3:00—Software Downsizing—Changing Professional Service Opportunities—John McGilvray will discuss the impact of downsizing on the various types of professional services, including equipment services.

4:00—Downsizing—What is Happening Internationally? —Peter Lines, Managing Director of INPUT LTD, and responsible for INPUT's offices in Germany, France and the U.K., will examine the status of downsizing in Europe.

5:00—Reception—Network with your peers. *Light hors d'oeuvres and cocktails.*

TUESDAY, NOVEMBER 3

7:30—Registration—Continental Breakfast

8:15—Process Downsizing—The Disappearing Data Center? —Tim Tyler, INPUT Consultant, will discuss how the approach and methodologies utilized in the implementation of downsizing strategies will impact the traditional data center.

9:15—The Outsourcing Revolution—Strategies for Success—J.P. Richard, Vice President and Manager of INPUT's Outsourcing Service will examine the changes and opportunities in IT outsourcing.

10:15—Break

10:45—Business Integration—Systems Integration Plus—Alan Nilsen, INPUT's Manager for Systems Integration, will discuss the business integration market.

11:30—Electronic Commerce—Networking of Information, Not Just Data—Torrey Byles, Manager of INPUT's Electronic Commerce Research, will discuss the concepts and market opportunities embedded in these areas.

12:15—Lunch

1:30—Desktop Services—The Market Opportunity of the 1990s —J.P. Richard will examine the opportunities particularly related to systems integration and outsourcing.

2:30—Conclusions—Downsize or Die?—Peter Cunningham, INPUT's President, will chair an open meeting with INPUT panelists and attendees to discuss these and other issues. This dynamic discussion will provoke hard questions for attendees to take with them back to their organizations. This session will also summarize and categorize what we have learned during the conference.

Register Today!

Call our
Conference Coordinator,
Glenna Nathans, at
(415) 961-3300

INPUT Programs

INPUT provides the following annual subscription programs to vendors and users:

Information Services Industry Market Analysis and Forecasts

- 9 Delivery Modes
- 17 Vertical Markets
- 7 Cross-Industry Markets

EDI/Electronic Commerce

Systems Integration

Outsourcing

Vendor Profiles and Strategies

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1992 U.S. EXECUTIVE CONFERENCE

on the Information Services Industry

November 1, 2, & 3 1992

REGISTER TODAY

INPUT's Annual Information Services Executive Conference

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Revolution in the Information Technology Industry

INPUT's 14th Annual Executive Conference

Dear Colleague:

If you pick one conference to attend this year, plan to attend this one. It will put into perspective the revolutionary changes occurring in the industry and give you the insights necessary to capitalize on them.

Do you want to be George Washington or George III? The Tsar or Lenin? Or more recently Bill Gates or Ken Olsen? These parallels sound dramatic, but so is the situation today in information technology (IT). INPUT will help you develop the strategies required to put your organization on the winning side.

We are constantly bombarded by the 'fluff' and 'hype' in the media and the marketplace. This conference will bring together the results of objective research and sane, measured opinions on the impacts of the revolution and what you must do about them.

In the last 18 years we have successfully predicted dislocation and change in the industry.

We plan to do so again.

Please write, call, or fax your attendance plans now. I look forward to personally welcoming you at this critical meeting.

Sincerely yours,

Peter A. Cunningham
President

FAX US YOUR... INPUT

FAX: (415) 961-3966

Name _____

Title _____

Company _____

Address _____

City _____

State _____ Zip _____

Phone _____ Fax _____

1992 ANNUAL U.S. EXECUTIVE CONFERENCE

Fairmont Hotel
San Francisco, CA

November 1, 2, & 3, 1992

REGISTRATION/INQUIRY

Please check one of the following:

- ☐ Yes, register me for this important conference.
- ☐ I would like more information. Please contact me.
- ☐ Also, please send me *additional* information on INPUT's Information Services Market Analysis Program

Attendance Fees:

- ☐ **Information Services Market Analysis, Downsizing Information Systems, EDI, and Vendor Analysis Program clients:** Two free attendees; $295.00 for each additional attendee
- ☐ **Clients of other INPUT programs:** $295.00 each
- ☐ **Non-clients:** $895.00 for first attendee; $545.00 for each additional attendee

Method of payment (payment must be received prior to conference):

- ☐ Purchase order number _____
- ☐ Check enclosed
- ☐ American Express card # _____ exp. _____

Signature _____

MAIL LIST

- ☐ *My responsibilities have changed. Please direct future information to:*

Name _____ Address _____

Title _____ City _____

Company _____ State _____ Zip _____

Phone _____ Fax _____

Please duplicate this form for additional attendees and return forms together.
Cancellations are subject to a $50.00 cancellation fee. No refunds made after October 15, 1992.
INPUT reserves the right to make changes to this conference without notice.

Competing in a Revolution!

Strategies for Dealing with Revolution in the IT Industry

The IT industry is undergoing wrenching change. Internal and external factors are destroying traditional markets and companies on one hand and creating huge new opportunities on the other. Executives must plan and organize resources in these unpredictable times.

In order to be effective and efficient (thus competitive), organizations must use IT—but IT must also be used properly and not wasted as it often has been in the last 20 years.

In the 1980s, the information services part of the IT industry—through the provision of software and operations services—grew to over $100 billion a year as organizations increasingly *bought* IT solutions instead of *making* them. Now this industry is faced with enormous potential markets and intense competition.

Peter Cunningham, President of INPUT, will set the stage for the conference. He will discuss the revolutions that are changing the IT industry, particularly those related to its structure and the role of IT in user organizations. Key issues include:

- How will IT be provided in organizations in the 1990s?
- What will be the role of the information systems department? Will it exist?
- What will the vendors provide? And to whom?
- What vendor groups will prosper and which will suffer?

Downsizing—Impact on the IT Industry

The opening of technology price/performance improvement to users through the direct or indirect use of open systems is enabling a revolution in the application of IT through the downsizing phenomenon! This movement is driven by business as well as technology factors!

R. Dennis Wayson, INPUT Vice President, will show how the IT world will be affected over the next five years. Key issues addressed include:

- What will be the impacts on the IS function?
- Which vendors will benefit from downsizing and why?
- What must companies do to deal with downsizing in their businesses?
- What will the industry look like in 1995?

Register Today!

Call our

Conference Coordinator,

Glenna Nathans

at (415) 961-3300

Revolution

Competing in a Revolution!

Impact of Downsizing on Software

The revolution that is hitting the computer hardware world will also dramatically impact software. Just as the microcomputer revolution created enormous wealth in companies such as Microsoft and Lotus, while at the same time destroying other companies, so will downsizing create opportunities for innovative software and eliminate existing businesses.

The revolution is not only in the software used, but in the way it is developed.

A series of sessions will address the impact of downsizing on various aspect of the multihundred-billion-dollar-a-year software industry.

A Radical Shift in the Software Paradigm

One of the key reasons for downsizing is to accelerate application development. The attitudes and processes used by developers in the new world differ radically from those in traditional IS development organizations. New tools are being used.

Thomas O'Flaherty, INPUT Vice President in charge of CASE and application development consulting, will discuss how software development is changing in a downsized world. Key issues will include:

- What vendors and products work in downsizing software development?
- How will users develop and support software?
- What are the problems being encountered?
- What will be the people issues involved in downsized software development?

Software Downsizing—The Disappearance of *Software Product* Companies?

Many of the software product companies operating in a downsized world operate on a different business model than traditional software product companies. Pricing, distribution, support, etc., are all different. Many companies operating in this world look more like service companies than traditional product companies.

John McGilvray, INPUT Principal Consultant and Manager of the Information Services Market Analysis Program, will discuss the potentially devastating effect on the software products industry of the downsizing phenomenon. Key issues addressed will include:

- Which software product vendors will be most affected and why?
- What will be the role of networks, CD ROM etc., on software distribution?
- What will vendors and users do about pricing of products in a networked, downsized world?
- Will new development environments destroy the traditional applications software markets.

Competing in a Revolution!

Software Downsizing—Changing Professional Services Opportunities

As downsizing spreads, the buyer of consulting, development, and implementation professional services changes. Less often is it the IS department. Also needs are different: geographically dispersed, shorter length of engagement, more varied knowledge requirements, etc.

John McGilvray, INPUT Principal Consultant and Manager of the Information Services Market Analysis Program, will discuss the impact of downsizing on the various types of professional services, including equipment services. Key issues include:

- Who will buy professional services and what will they expect?
- What will be the nature of the services provided?
- What new vendors will emerge and what will be the impact on existing vendors?
- How must companies react to the need for integrated technology and business skill sets?

Downsizing—What Is Happening Internationally?

Is this phenomenon purely a U.S. one? How are European organizations in particular responding to changes? The prevailing wisdom is that European countries lag behind North America in their adoption of management methods and technologies. But in this case, *open systems* has been more readily adopted in Europe than the U.S., and *open systems* is one of the keys to downsizing.

Peter Lines, Managing Director of INPUT LTD. and responsible for INPUT's offices in Germany, France, and the U.K., will examine the status of downsizing in Europe.

Key issues will include:

- Which European countries are adopting downsizing?
- What will be the impact on *local* vendors such as Bull, ICL, and SNI?
- How has the European community emphasis on open systems affected this trend?
- What is the impact of less developed telecommunications infrastructure on downsizing?

Process Downsizing—The Disappearing Data Center (?)

Downsizing will affect many mainframe-based services. But will the data center really disappear? A lot will depend on the motivation and methods adopted by firms pursuing a downsizing strategy.

Tim Tyler, INPUT Consultant, will discuss how the approach and methodologies used in the implementation of downsizing strategies will impact the role of the data center. Key issues will include:

- How do organizations go about IT downsizing?
- How do organizations choose the form of downsizing to adopt?
- Who is involved in the decision and vendor selection?
- What is the impact on the data center and outside services?

Competing in a Revolution!

The Outsourcing Revolution—Strategies for Success

Outsourcing is changing; it is now being regarded more as a means to an end than an end in itself. It is increasingly being used as a catalyst for change. IT functions other than the data center are being outsourced. However, is there an inherent conflict between downsizing and outsourcing?

J. P. Richard, INPUT Vice President and Manager of INPUT's Outsourcing Service, will examine the changes and opportunities in IT outsourcing. Key issues will include:

- What will be the opportunities in the explosive outsourcing market?
- How will outsourcing be used in transition situations?
- What will be the impact of downsizing on the outsourcing process?
- Which vendors will prosper in the 1990s through outsourcing?

Business Integration—Systems Integration Plus

Finally vendors are recognizing that a system includes more than hardware, software, and networks. It includes people, processes, procedures, and organizational infrastructure. The IT components must be changed with the non-IT components in order for significant benefits to be obtained. Various terminologies have emerged: business re-engineering, business process re-engineering, change management, transition management, functional operations, etc.

In this session, **Alan Nilsen**, INPUT's Manager for Systems Integration, will discuss the business integration market. Key issues will include:

- What are the differences between various vendor approaches?
- How do users view the methodologies being employed?
- Can computer systems companies play a valid role in business integration
- What lies beyond business integration? What is the future of business operations?

Electronic Commerce—Networking of Information, Not just Data

Electronic data interchange (EDI) formed the technological basis for electronic relationships between companies and among industry groups. The extension of EDI to Electronic Information Interchange (EII), including image, message, text, voice, and eventually video transforms the way organizations interact. Electronic commerce (or electronic trading as it is known in Europe) restructures trading groups.

Torrey Byles, Manager of INPUT's EDI and Electronic Commerce research, will discuss the concepts and market opportunities embedded in these areas. Key issues include:

- What trading groups provide major opportunities?
- Which vendors will provide the required products and services?
- How does EDI evolve to electronic commerce?
- What will be the impact of electronic commerce?

Desktop Services—The Market Opportunity of the 1990s

As the downsizing and user-operated IT trends overtake the industry, the need for multilocation desktop services will grow exponentially. Yet neither users nor IS organizations are equipped to offer them, nor indeed do they want to in many cases. There are already very large contracts ($100 M and up) in this area.

J.P. Richard, INPUT Vice President and Manager of INPUT's Outsourcing Program, will examine the opportunities particularly related to systems integration and outsourcing. Key issues will include:

- How do users view accepting responsibility for IT?
- What services will they want and who will they look to?
- What relationships make sense in this dispersed, fragmented environment?
- Which vendors will prosper?

Conclusions—Downsize or Die?

Are the changes as dramatic as they seem? Will they have the same impact as the microcomputer/PC revolution of the early 1980s? What will happen to the information services markets? What will happen to IS organizations and IT vendors?

Peter Cunningham, INPUT's President, will chair an open meeting with INPUT panelists and attendees to discuss these and other issues. This dynamic discussion will provoke hard questions for attendees to take with them back to their organizations. This session will also summarize and categorize what we have learned during the conference.

1992 Annual Executive Conference

November 1, 2, & 3
Fairmont Hotel
San Francisco, California

CONFERENCE REGISTRATION FEES

Clients—INPUT Information Services Market Analysis, Downsizing Information Systems, Vendor Analysis, and EDI program clients: send two representatives as part of your service contract. Additional representatives or subscribers to other INPUT programs attend for the fee of $295 each.

Nonclients—The first representative of a nonclient company attends the conference for $895. Additional attendees from the same nonclient company attend for $545.

PAYMENT AND CANCELLATION POLICY

Cancellations must be in writing and are subject to a $50 cancellation fee. No refunds for cancellations after October 15, 1992. INPUT considers purchase order numbers, company checks, and American Express as proper reservations.

Payment must be received prior to the conference.

INPUT reserves the right to make changes to this conference without notice.

ACCOMMODATIONS

The historic Fairmont Hotel located atop Nob Hill, San Francisco, has easy access to Fisherman's Wharf, Chinatown, and Union Square shopping, and is 25 minutes from San Francisco International Airport.

Please make your reservations directly with the hotel. Call (415) 722-5000, or toll free 1-(800) 527-4727. Be sure to ask for the INPUT conference rate —

$155 single or double—Main Bldg.
$185 single or double—Tower.

Room space can only be guaranteed until October 12, 1992, so **book early**! Reservations after that date are subject to availability.

About INPUT

INPUT is a worldwide consulting and market research firm uniquely focused on the information technology services and software markets. Executives in many technically advanced companies in North America, Europe, and Japan rely on INPUT for data, objective analysis, and insightful opinions to support their business plans, market assessments, and technology directions. By leveraging INPUT's considerable knowledge and expertise, clients make informed decisions more quickly, and benefit by saving on the cost of internal research.

Since 1974, INPUT has compiled the most extensive research base available on the worldwide information services market and its key segments, providing detailed market forecasts, vertical industry sector analysis and forecasts and analysis of vendor strategies and products. INPUT delivers specific expertise in the fast changing areas of outsourcing, systems integration, EDI/electronic commerce, software development/CASE, and on the impact of downsizing.

Consulting services are provided by more than 50 professionals in major international business centers. Clients retain INPUT for custom consulting/ proprietary research, subscription-based continuous advisory programs, merger/ acquisition analysis and detailed studies of U.S. federal government IT procurements.

Most clients have retained INPUT continuously for a number of years, providing testimony to INPUT's consistent delivery of high-value solutions to complex business problems. To find out how your company can leverage INPUT's market knowledge and experience to gain a competitive edge, call us today.

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Kanda Sakuma-cho, Chiyoda-ku
Tokyo 101, Japan
Tel. (03) 3864-0531
Fax (03) 3864-4114

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Fax (415) 961-3966

August 21, 1992

Dear Colleague:

As a result of feedback we've received from a number of our clients in planning INPUT's annual executive conference, we have decided to reschedule it as indicated below. The conference will be held at the same location, the Fairmont Hotel in San Francisco. Please take a minute now to note the new date:

New Date!

INPUT U.S. EXECUTIVE CONFERENCE

Competing in a Revolution

November 1, 2, & 3, 1992

You have told us that the information technology "revolutions" INPUT has identified—outsourcing, downsizing, networking, and re-engineering—are indeed having a profound effect on your business. Accordingly, our conference approach has been adjusted to concentrate on INPUT's research and insights on these important topics. We are excited about the conference and look forward to delivering the ideas and expert advice necessary for your strategic planning efforts for 1993 and beyond... helping you to compete in a revolution.

Please mark your calendar for November 1, 2 and 3, 1992. We look forward to seeing you there.

Sincerely,

G. Christopher Smith
Vice President

P.S. Call our conference coordinators—Barbara Fisher at (703) 847-6870 or Glenna Nathans at (415) 961-3300 to register for this important conference!

INPUT®

1992 U.S. EXECUTIVE CONFERENCE

Fairmont Hotel, San Francisco, California October 4, 5, and 6, 1992

Gain a thorough understanding of the major trends within the information services industry-economic, technological, and structural. Evaluate the impacts on the market, its projected growth, leading vendors, and future directions. This conference focuses in particular on the downsizing revolution and its impacts on the industry. Key topics include:

- The information services industry forecast
- Downsizing implications on information systems and vendors
- Strategies for turning downsizing into an opportunity
- Workshops on each of the 8 market segments: processing services; turnkey systems; applications software products; systems operations; systems integration; professional services; network services; and systems software products

Conference fees for INPUT clients: No charge for the first two attendees for subscribers to the Market Analysis, Vendor Analysis, EDI/Electronic Commerce, and Downsizing Information Systems Programs; $295 for each additional attendee or subscribers to other INPUT programs.
Conference fees for non-clients: $895; $545 for each additional attendee.

Join the leading experts and INPUT senior consultants to get first-hand information on what's happening in these various industries. And don't miss a unique opportunity to network with your peers.

Register today! To register for any conference, or for more information, call Barbara Fisher, Conference Coordinator, at (703) 847-6870. If you are not a client, take advantage of an early registration discount of 10% by registering 30 days prior to the event.

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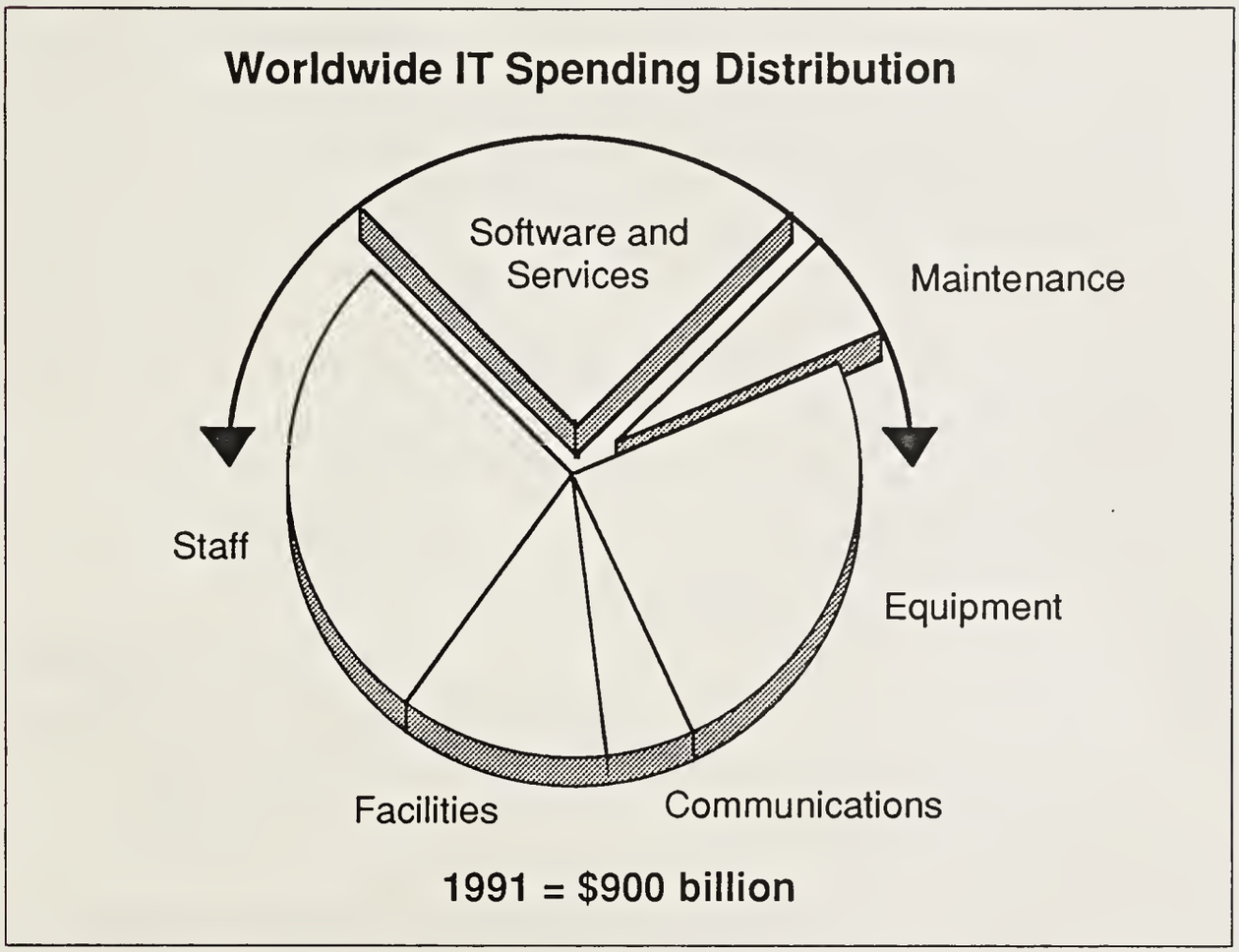
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MAW

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Worldwide Information Services Market Report



Forecasts the worldwide, regional and major country markets for:

- **Systems Software Products**
- **Applications Software Products**
- **Turnkey Systems**
- **Equipment Services**
- **Professional Services**
- **Systems Integration**
- **Systems Operations**
- **Processing Services**
- **Network Services**

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Worldwide Information Services Market Report

REPORT DESCRIPTION

The worldwide market for information services and software products exceeded $230 billion in 1991. It is becoming a global market with opportunities for growth outside local markets. INPUT's worldwide forecast of the information services and software products market provides the foundation to expand planning horizons.

Industry Structure

The entire industry is reviewed and forecasted for the 1992-1997 period for:

- Systems Software Products
- Applications Software Products
- Turnkey Systems
- Equipment Services
- Professional Services
- Systems Integration
- Systems Operations
- Processing Services
- Network Services

Geographic Coverage

The world is divided into five major regions:

- North America
- Europe
- Asia/Pacific
- Latin America
- Mideast/Africa

Thirty (30) individual countries or small groups of countries are covered, ranging from the United States, which represents 47% of the worldwide market, to Singapore, which represents less than 1% of the market.

Fourth Issue

The 1992-1997 issue is INPUT's fourth year of forecasting the worldwide information services market. It includes new primary research in all parts of the world and a full assessment of the market opportunities available.

For more details please contact your nearest INPUT office.

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Service Agreement

INPUT®

Worldwide Information Services Market Report

Please enter my order as described:

INPUT's Worldwide Information Services Market Report:

☐ $6,000 as a subscriber to other INPUT programs.

☐ $7,495 as a nonsubscriber to other INPUT programs.

Travel expenses for on-site presentations are additional and will be billed separately.
California Clients: Please add applicable sales tax on 25% of purchase price.

TERM OF SUBSCRIPTION—The initial term of this subscription will be for twelve (12) consecutive months beginning _____. The subscription will automatically renew for each succeeding year unless INPUT receives written notice sixty (60) days prior to the start of each renewal period. The fees for INPUT services defined in this Agreement and its attachments will be invoiced each year at INPUT fees then in effect, due and payable on or before the start of the program subscription period.

TERMS OF PAYMENT—Payment in full is due within 30 days of invoice date.

☐ Enclosed is my check in the amount of $_____.

☐ Bill my company on purchase order number _____in the amount of $_____.

CONDITIONS AGREEMENT—The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person including parent, subsidiary, or affiliated organizations without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense that may result from incompleteness or inaccuracy of the information provided. INPUT reserves the right to change or modify the content of the program in response to changing client requirements.

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Organization

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Title

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Telephone

Signature Date

Accepted By INPUT:

Signature

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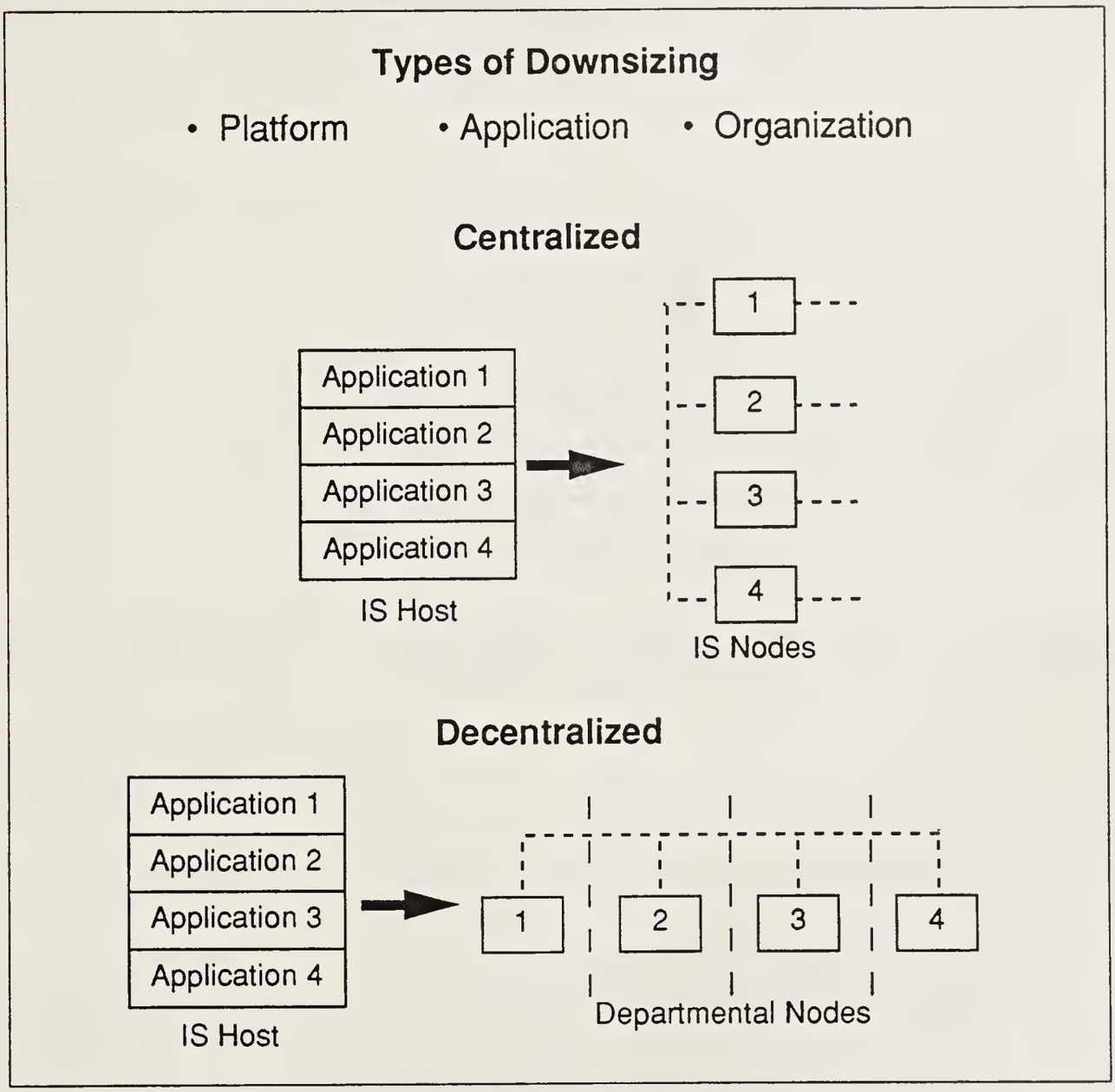
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Date

UIISP

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Downsizing Information Systems Program



Analyzes the downsizing revolution in the 1990s and its impact on users and vendors of information systems and services.

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Downsizing Information Systems Program

SUMMARY

Analyzes the downsizing revolution in the 1990s and its impact on users and vendors of information systems and services. In-depth research probes the methods by which organizations can and are downsizing. Critical issues, such as open systems and data security, are addressed.

REPORTS

Putting Downsizing in Perspective

Systems Architectures for Downsizing

Case Studies in Downsizing

Impact of Downsizing on IT Vendors

Data Quality and Security in Downsized Environments

Methodologies for IT Downsizing

Open Systems Opportunities

Research Bulletins — Regular reports on INPUT research findings and analysis of important industry announcements, trends, and issues.

SERVICES

Telephone Inquiry — Use the "hotline" to obtain answers to your immediate questions.

Access to INPUT Consultants — Obtain opinions and advice from INPUT executives and consultants from meetings, mail, fax, and the telephone.

On-Site Visit — Discuss your issues and concerns, introduce experts to your organization, and obtain presentations on industry trends.

Conference — Review the state of the industry and network with executives from other INPUT clients.

Downsizing Information Systems Program

BACKGROUND and BENEFITS

There is a *revolution* in the use of information systems in the 1990s. Users are taking advantage of rapid changes in price/performance in storage, processing and telecommunications to reduce their costs and implementation time. As a result, there are major impacts on both user and vendor organizations.

The main factors in this revolution are the move to open systems and the buyer's emphasis on value and speed. Open systems are the "can opener" that enable the user to access the true rate of change in price/performance in the basic information technologies, which is more like 40% per year than the 20% that has been traditionally used.

The **Downsizing Information Systems Program** is based on INPUT's 15 years of analyzing trends in the industry. It provides insights on the reasons for and against downsizing, emphasizes buyer values, competitive offerings, and actual installation experience.

Save Time and Money	Obtain realistic data on opportunities in downsizing
Keep on Top of this Revolution	Revolution means dramatic, non-linear change. This is happening in downsizing. This program enables you to keep on top of and to predict such changes.
Vendor Analysis	Identify what key vendors are doing in this area. Evaluate the impacts on those vendors most important to you.
Avoid Dangers	In any revolution heads will roll! The information and consulting from this program helps you avoid the dangers inherent in the downsizing revolution.
Consulting Support	Test strategies and tactics through the "hotline" and access to INPUT consultants and executives.
Networking	Develop working relationships with complementary organizations through meetings and INPUT staff.

Downsizing Information Systems Program

PROGRAM DESCRIPTION

The **Downsizing Information Systems Program** analyzes trends, issues, vendors, opportunities, and actual implementations of downsizing. Downsizing is the replacement of a large system by a smaller system or series of systems. INPUT has identified three types of downsizing:

- *Platform*
- *Application*
- *Organization*

INPUT has also found that downsizing does not necessarily equal distributed or decentralized processing; some forms of downsizing are highly centralized. Each of these attributes is explored through user research, including case studies.

Through user and vendor research, the program examines the processes, methods and architectures by which downsizing is accomplished. There is often a short-term increase in costs in order to accomplish downsizing. The size of these costs and their timeframe of use is measured. The current and long-term changes in organization resulting from downsizing are investigated and the implications for IS managers and vendors presented.

This revolution will affect the IT industry even more than the personal computer revolution of the 1980s. The program emphasizes the importance of predicting the impacts on vendors of all kinds, particularly the major vendors such as IBM, Digital, Microsoft, Sun Microsystems, Oracle, EDS, Novell, and Japanese companies such as Fujitsu, Hitachi, Sharp, Toshiba, and NEC.

RELATED INPUT PROGRAMS

Outsourcing Information Systems Programs (U.S. and Europe) provide research on the revolution in systems operations, network operations, applications management and desktop services opportunities.

Information Services Market Analysis Programs (U.S. and Europe) provide forecasts, trend analyses, and industry reports for software products, professional services, turnkey systems, processing services, and network services.

Custom Research and Consulting Services satisfy unique needs for market research, competitive analysis, IS strategy development, acquisition support and other tasks based on INPUT's extensive experience and information resources.

Downsizing Information Systems Program

CLIENT SUPPORT SERVICES

Clients gain maximum benefit from the industry research and consulting services available to them through the development of a strong, continuous relationship with INPUT staff. Through frequent contact and sharing of opinions and ideas, you receive a flexible response to changing areas of interest and focus. INPUT provides the following specific services in order to build a full relationship:

Consultant Access	Continuous support from INPUT's consultants and executives who are available to share opinions and reactions to events, and to discuss ideas and challenges.
Conference	Gain a thorough understanding of the major trends within the information services industry—economic, technological, and structural. Evaluate the impacts on the market, its projected growth, leading vendors, and future directions. This conference focuses in particular on the downsizing revolution and its impacts on the industry.
On-Site Presentation	INPUT consultants present and discuss research findings at your site. Research presentations can be tailored to focus on your needs. Discuss specific interests and issues in confidence. This presentation is an excellent method of distributing key information through the organization and of obtaining more uses of the research materials.
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Downsizing Information Systems Program

REPORT DESCRIPTIONS

Putting Downsizing in Perspective
Based on a structured survey of information systems executives and information software and services vendors, this report provides the framework to bring the downsizing revolution into clear view. It answers questions about rightsizing, including issues about platform size, network integration, applications, and data bases. The roles of the mainframe, midrange, RISC server, and workstation are examined.

Systems Architectures for Downsizing
This report expands on the downsizing research of late 1991. It looks at the strengths of various architectures relative to different IS environments and the different forms of downsizing. The use of open systems, LAN technologies, UNIX, and client/server structures are all examined through user and vendor research. The strengths and weaknesses of each systems architecture are evaluated relative to expressed user needs.

Case Studies in Downsizing
Provides profiles of examples of downsizing within the information systems arena. Examples include complete shifting of processing from mainframe to smaller platforms, redeployment of key applications to client-server/cooperative processing/ workstation technology and the downsizing of the actual IS function through reorganization. Each case study will be in depth (10 to 15 pages).

Impact of Downsizing on IT Vendors
What will happen to IBM in the downsized world? What will happen to those other vendors that are heavily dependent on traditional methods of IS processing? If price/ performance improvements outstrip demand, the industry will actually shrink. Will this happen? And if so, what will be the impacts on the different vendor communities? What roles will the basic technology vendors such as Intel, Motorola, LSI Logic, NEC, and others play in the competitive environment of the future? How will the "new" vendors develop? These and other vendor issues are addressed in this study. (Detailed evaluation of the impacts on information services vendors in professional services, software products, turnkey systems, systems integration, systems operations, and processing services, and on customer services organizations are contained in the appropriate INPUT program.)

Data Quality and Security in Downsized Environments
INPUT research shows that data quality and security are the major impediments to the adoption of downsizing. This project investigates the methods by which these problems can be overcome. User needs are analyzed and the opportunities for vendors and IS organizations identified.

Downsizing Information Systems Program

REPORT DESCRIPTIONS *(Continued)*

Methodologies for IT Downsizing
How do organizations go about IT downsizing? Who initiates the process and how is it carried out? What are the costs and how long does it take? How do organizations choose the form of downsizing to adopt? What are the evaluation criteria? Who is involved in the decision and vendor selection? These and other questions are addressed by in-depth research with organizations that have adopted downsizing; are evaluating it; have rejected it.

Open Systems Strategies
Open systems are making downsizing possible and many vendors are adopting open systems strategies. What is the real acceptance in the traditional information systems arena? How do IS managers view open systems? What are the real opportunities?

RESEARCH BULLETINS

Downsizing clients receive Research Bulletins from the full spectrum of INPUT's research in the U.S. Research Bulletins are frequent, short reports that:

1. Present results from research studies as quickly as possible. These Research Bulletins communicate key findings on issues, trends, new developments and ideas, market forecasts, and vendor analysis.
2. Provide INPUT's analyses of important industry announcements, events, awards, and other activities. These Research Bulletins analyze the meaning of these activities rather than just give the news.

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What Is an Open System?

The Customers Speak

- ✓ Learn the Customers' Definition
- ✓ Discover the Barriers to Acceptance
- ✓ Identify the Benefits and Problems of Interoperability
- ✓ Balance Open Systems and UNIX

Market Intelligence

and Strategic

Planning Services

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Get the Answers in INPUT's Report, *Open Systems Opportunities*

Is it because the customer doesn't believe or understand open systems or because the technology isn't proven?

What do the customers think open systems is all about?

The expectations from open systems continue to grow, yet the definition remains unclear and the progress mixed. A new report from INPUT, *Open Systems Opportunities*, puts the open systems question in perspective for information software and services vendors, and for information systems management.

Based on extensive interviews and discussions with information systems managers and open systems vendors, this report answers the question—*what is an open system?* And does so from the buyer's point of view.

Clearing the Air

Open systems has attracted much fanfare and a few strong proponents. It has impacted the strategy of all vendors, large and small, and become the cornerstone of their strategy for the 1990s for some. Yet, the acceptance level lags and the confusion continues.

Is it because the customer doesn't believe or understand open systems or because the technology isn't proven?

The objective of this new report from INPUT is to answer these questions and more. And to help the information software and services vendor focus its strategy in this area.

Setting the Requirements

All too often the definition for a new technology develops haphazardly. The result is that buyers are confused and vendor investments go astray.

The opportunity for this to happen in the open systems area is exceptionally strong. The promises of interoperability and freedom from the underlying technology are large and unproven.

INPUT has focused its research on setting the requirements. Getting the users to:

- Define open systems in their terms
- Comment on what the standards will be
- Share their perceptions
- Identify the barriers
- Access open systems and UNIX
- Discuss open systems, DBMS and CASE

INPUT believes this is one information technology revolution that will be managed by the buyers. If they can't figure it out—they won't buy.

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Dear Colleague:

Is your company betting on open systems for market advantage? If so, you need INPUT's most recent report, *Open Systems Opportunities*, to bring clarity to your strategy.

Open systems is a 1990s phenomenon that many software and services firms are expecting to give new life to their business plans. Many expect new generations of software, hardware and services will be bought just to gain the benefits of interoperability. And many information systems managers are looking to open systems to gain freedom from the restrictions of proprietary computing environments.

But neither of these will happen by themselves.

Using extensive interviews with information systems managers and key vendor personnel, INPUT has quantified the attitudes and opinions to bring a framework to this important revolution. This report will prove invaluable to anyone trying to grasp the true perceptions about open systems in the minds of those who will make the go/no go decision about investing.

Hone your strategy for open systems and lead the competition. This INPUT report will make a big difference. Fill out the enclosed form to order your copy today.

Sincerely,

Douglas H. Tayler
Vice President, Research

P.S. Enjoy a savings of 10% off the regular price if you place your order before February 21, 1992.

SAVE $250 IF YOU ORDER BY February 21, 1992!

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Vendor Planning and Positioning

Given the lack of clarity of definition, vendors are adopting open systems strategies that are not clear and are in conflict. INPUT looks at this issue and positions the vendors within the open systems arena.

- Who is on first base?
- Who is hiding behind the open systems shadow?
- Who is making investments?
- Are open systems and UNIX synonymous?
- How do the strategies compare?

The vendors are responsible for bringing a clear message to the marketplace. INPUT finds out if this is happening and to whom to listen. And predicts where this revolution is headed.

Clear, Practical Recommendations

Most information software and services vendors are off and running with their open systems strategies. This report, *Open Systems Opportunities*, provides the framework to test and refocus your strategy and turn it into tactics.

Open Systems Opportunities

Open Systems—Background

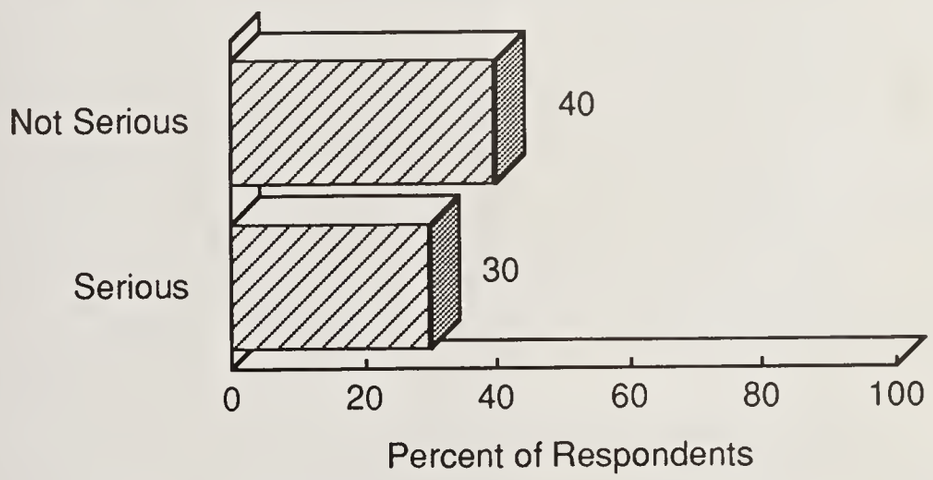
- Rationale for Open Systems
- Levels of Open Systems User Requirements
- Definitions and Expectations
- Standards
- Interoperability
- Perceptions of Open Systems
- Barriers to Use

Vendor Positioning

- Individual Vendors
- Coalitions

Conclusions and Recommendations

Barrier to Open Systems: Development Tools



Note: Intermediate responses omitted

Source: INPUT

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INPUT provides planning information, analysis, and recommendations for the information technology industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Subscription services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services. INPUT specializes in the software and services industry which includes software products, systems operations, processing services, network services, systems integration, professional services, turnkey systems, and customer services. Particular areas of expertise include CASE analysis, information systems planning, and outsourcing.

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

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INPUT®

Benefit from the Downsizing Revolution—

INPUT Shows You How

Announcing 2 New Reports on Downsizing:

- *Systems Architectures for Downsizing*
- *Case Studies in Downsizing*

Gain the most from the downsizing revolution with INPUT's analysis

In *Putting Downsizing in Perspective,* INPUT captured and contrasted the current thinking of information systems managers and information technology vendors concerning downsizing. Now INPUT provides the framework for planning a downsizing strategy and characterizes the obstacles through analysis of real experiences with downsizing strategies.

Systems Architectures for Downsizing

Report Highlights

Downsizing & Hardware-Software Architectures

- Hardware Platforms & Operating Systems
- Applications & Data Bases
- Business Processes & Networks of Systems

Competing Architectural Concepts

- Open vs. Proprietary
- Client/server vs. Cooperative Processing
- Centralized vs. Distributed Data Bases

Downsizing, Productivity and Effectiveness

- Performance Levels
- Cost Factors

Organization & Management Implications

- Organizational Architectures
- Business Processes and Downsizing

Challenges & Opportunities

Planning an information systems architecture has been a weakness of many information systems programs. Expansion from mainframes to minicomputers, personal computers, and LANs has often been opportunistic, complicating network integration. The *downsizing revolution* offers a new opportunity to build a solid architecture.

Systems Architectures for Downsizing provides the framework to assess and plan a systems architecture for current and future technologies, including images, graphics, text, and more.

Questions Answered

This assessment of the downsizing area addresses the architecture question head on. The issues, exposures, and potholes are identified and analyzed, and key questions addressed:

- Can the expected cost savings be achieved?
- Will broader, more valuable benefits result?
- Will data security, synchronization and integrity be maintained?
- What applications are candidates for downsizing?
- What are the competing architectures for use in downsizing?
- Will downsizing IT finally empower humans with information?

Planning Framework Provided

Downsizing is yet another adventure using information technology to improve the way organizations work. INPUT's report *Systems Architectures for Downsizing* provides many of the answers. And it provides the framework to help develop that all-important architecture from the start—not after you have downsized.

INPUT®

Case Studies in Downsizing

As with every new information technology revolution, the first to try it provide the foundation for those that follow. This rule will certainly prove true and of great value in the downsizing revolution.

In the report, *Case Studies in Downsizing*, INPUT provides the insight to help others learn from the early experimenters through in-depth case studies from a variety of industries.

- What has been tried
- Why was it tried
- What could have been different
- What were the costs and the benefits

Case Study Analysis

This report goes much farther than just documenting the case studies of a number of larger organizations from various industries. It provides analysis of these cases as yet another planning tool to help you develop a successful strategy.

Cost Planning Model Provided

The costs and cost savings of downsizing information technology warrant careful analysis. The promise of lower cost technology is significant, but technology is not the only expense involved. INPUT has reviewed costs in its case studies, identified real and potential hidden costs, and developed a cost model to guide your own planning.

Management expectations of downsizing strategy will be very high because of what is being written in the press. With INPUT's *Case Studies in Downsizing* report you can balance management expectations with reality and be prepared for the unexpected.

Clear, Practical Recommendations

These two new reports provide the insights you need to conquer the downsizing revolution. Don't get left behind—order them today, as well as the previously published *Putting Downsizing in Perspective,* for the full story.

Watch for future INPUT reports on the downsizing revolution.

Downsizing Methodologies

Data Quality and Security in Downsizing

Downsizing Impacts on Information Services Vendors

Report Highlights

Case Studies

- Computer Manufacturer
- Transportation Company
- Educational Institution
- Food Processing Company
- Manufacturing Company

Analysis of Case Studies

- Factors Prompting and & Inhibiting
- Application & Platform Selection
- Cost Factors
- Benefits & consequences

A Downsizing Cost Model

- Identifiable costs
- Hidden costs

Conclusions and Recommendations

- Costs & Benefits
- Measurement & Planning

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INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

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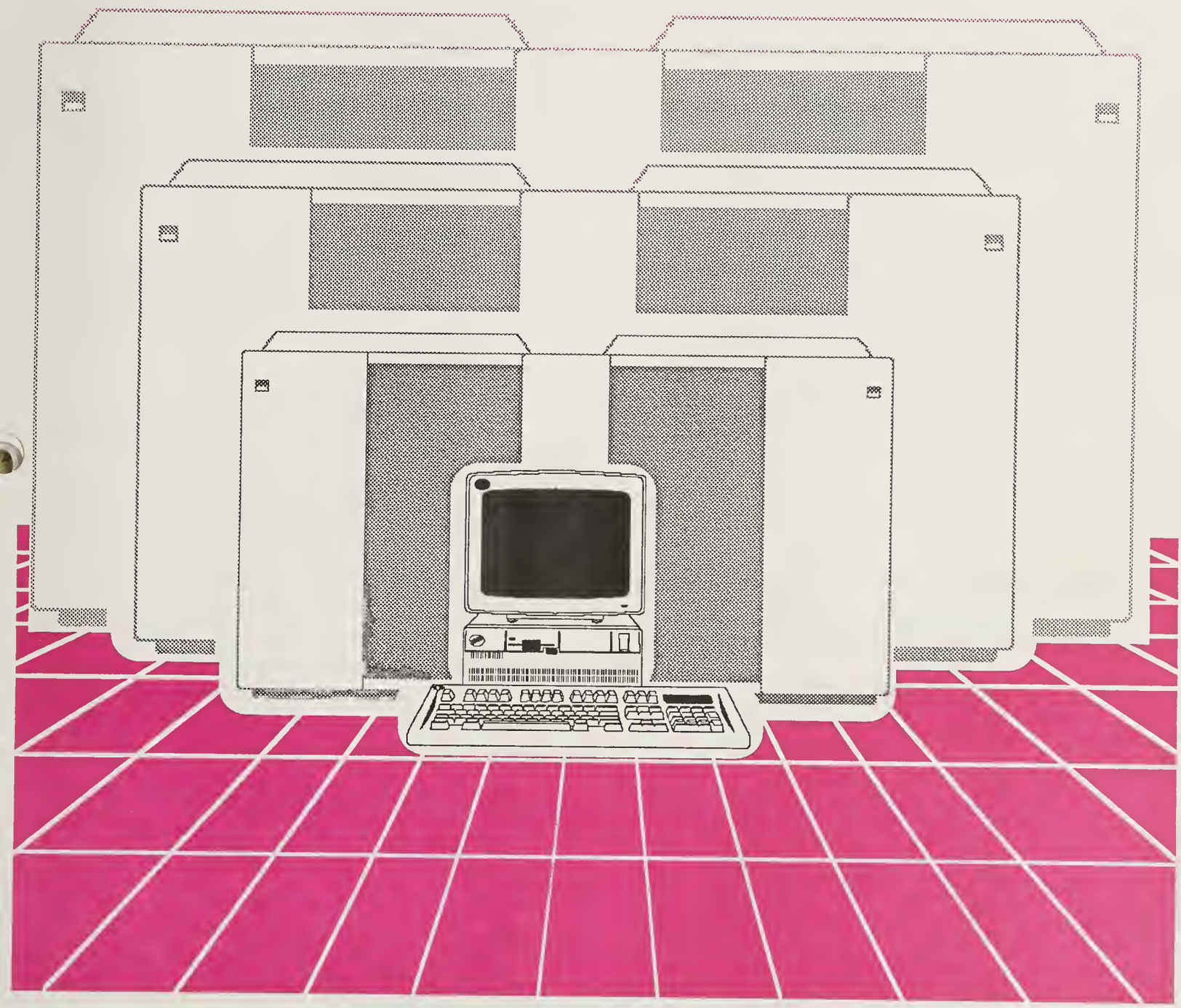
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The Downsizing Revolution Has Started

Let INPUT® Put It in Perspective



Putting Downsizing in Perspective—

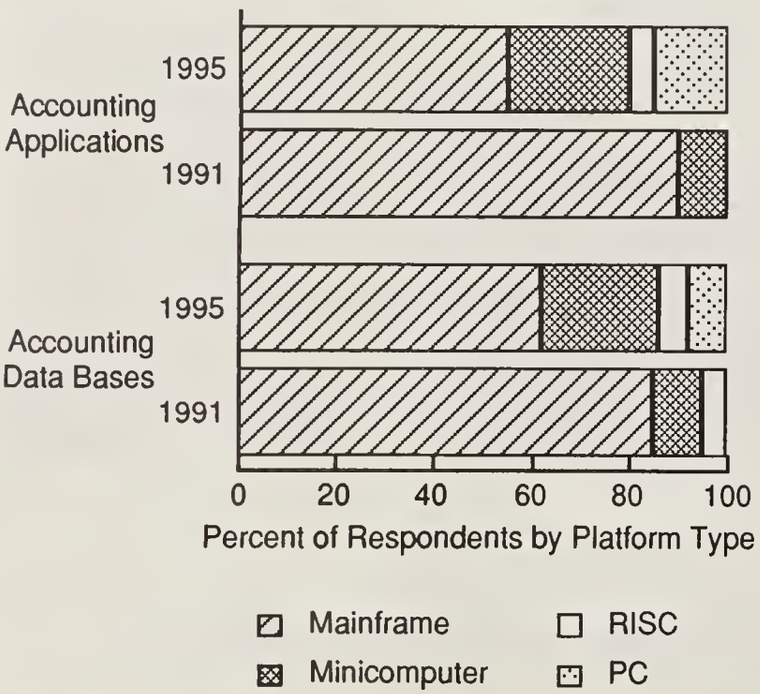
INPUT®'s Report Provides Important Information for Your Strategic Plan

Manage the Downsizing Revolution With INPUT's Analysis

Putting Downsizing in Perspective provides readers, both user and vendor, with the foundation to leverage the benefits of the downsizing revolution. The rewards of downsizing are expected to be tremendous, but the pitfalls are numerous. In this new report INPUT provides the framework needed to be successful.

Downsizing has hit the information systems and technology arena with the same impact as outsourcing has. It carries the promise of improved return on investment, greater freedom for the user, new opportunity for the vendor and an aura of ease of accomplishment. Whether a company is downsizing the central platform, shifting applications to LANs and workstations or downsizing the information systems function, INPUT's first assessment of this new phenomenon provides the framework to understand and plan for success.

Application and Data Base Location



Drawing on an in-depth survey of information systems and vendor management, INPUT has put together the first full perspective. There is no question that downsizing is a real trend, but it is unknown if it will increase the often criticized return on the IT investment. INPUT's report provides the answers to key questions, to ensure that the return is positive.

Issues Addressed

The report answers questions such as:

- Is there a definition for downsizing (perhaps more than one)?
- Is downsizing understood?
- What is different about this revolution from the minicomputer or PC revolutions?
- What will the roles of the mainframe, midrange, RISC server and workstation be in the 1990s—are they different?
- Where do client/server and cooperative processing fit in?
- How do IS management and vendor perspectives compare?
- By whom and where is downsizing capability being implemented?
- How fast will it progress?
- Which applications are candidates for downsizing (or rightsizing)?
- Which data bases can be moved in the network?

Answers to these questions are needed to gain a fundamental understanding of this new trend and to build a framework for including downsizing in your information systems and product plans.

Using examples, both current and past, INPUT positions its assessment against reality. Who is making progress, what vendors are investing in solutions and how can the transition from current to future be achieved.

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Dear Colleague:

The downsizing revolution has hit the information systems function. Companies are charging ahead, expecting yet unrealized gains from information technology, and vendors are focusing their strategies on downsized technology. Yet, as with every new information technology revolution, there is more confusion than clarity.

Gain the clarity you need from a new INPUT report, *Putting Downsizing in Perspective*. Based on a structured survey of information systems executives and information software and services vendors, INPUT's report provides the framework to bring the downsizing revolution into clear view.

Asking the same questions of information systems managers and vendors has provided INPUT with the data to address the following issues:

- Where do IS and the vendors agree and disagree?
- What are the barriers to proceeding?
- How much activity is under way and how fast will downsizing proceed?
- What applications are the best candidates for downsizing?
- If the application shifts elsewhere in the network, will the data base follow?

The real question is rightsizing. Whether it is the IS network, the central processor, or the particular application, the question is—where should the activity happen in the information network? And what type of processor is best for the particular function?

Get the perspective to focus your plans and compete in this revolution from INPUT's report, *Putting Downsizing in Perspective*. Fill out the enclosed form to order your copy today.

Sincerely,

Douglas H. Tayler
Vice President

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IS Management and Vendor Viewpoints

By asking information systems managers and vendors the same questions, this report is able to present both points of view. Where are IS and vendor plans and attitudes consistent and, more importantly, where do they disagree?

If IS management and the vendor do not have a common objective, vendor investments in products and services may not be rewarded and IS's willingness to try downsizing capabilities will be slow to develop.

The issues reviewed include:

- Is there a future for the mainframe?
- What are the roles of minicomputers, RISC servers and workstations?
- What is the best location for key IT functions?
- In what areas are the benefits?
- How fast will downsizing progress be made?

What Is the Issue—Platform Size or Network Integration?

The real issue involves not only downsizing, but upsizing and rightsizing. The benefits of higher speed, smaller and less costly computers have been visible for fifteen years. But the network capabilities to leverage the strengths of the various computer sizes has not existed.

Now that network integration is possible it is time to put computing at the appropriate level depending on the function.

Clear, Practical Recommendations

Downsizing offers many new opportunities, but only if grasped in concert with existing environments and plans. It is not a panacea and has in fact been part of information technology and the information systems area for twenty years. But as this report describes, some aspects of downsizing are new and careful planning is essential.

Putting Downsizing in Perspective

Understanding Downsizing

- Terminology
- The Meaning
- Framework for Understanding

Downsizing and Network Architecture

- Hierarchical Framework
- IBM and Downsizing
- Client/Server and Downsizing
- Related Network Factors

Architecture and Plans

- Platform Roles
- Applications—Now and Future
- Data Bases—Now and Future

Downsizing Trends

- Impacts on Platforms
- Distribution of IT Functions
- Rate of Expected Progress
- Anticipated Benefits

Conclusions and Recommendations

INPUT's goal is to help you successfully grasp the opportunities. Don't get left behind. Use INPUT's assessment of the downsizing revolution to set your plans. Gain an understanding of how IS management is approaching the opportunity and be sure your plans are in balance! Use the enclosed form to order your copy of *Putting Downsizing in Perspective* today.

Call, fax, or mail your order to any INPUT office listed on the back of this brochure.

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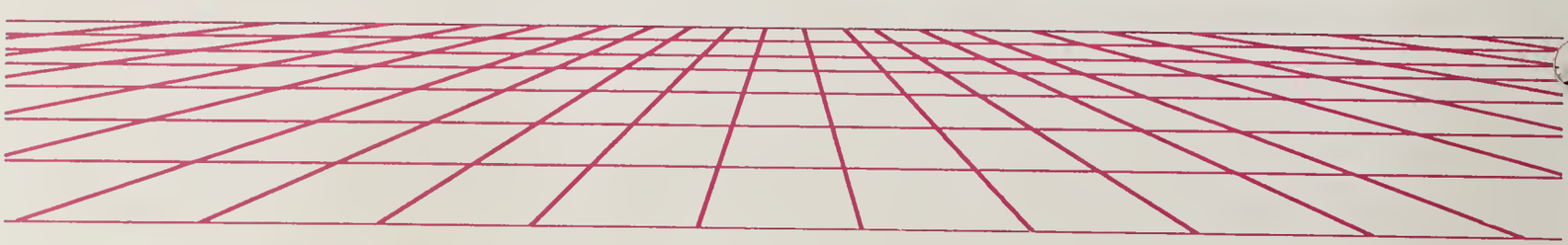
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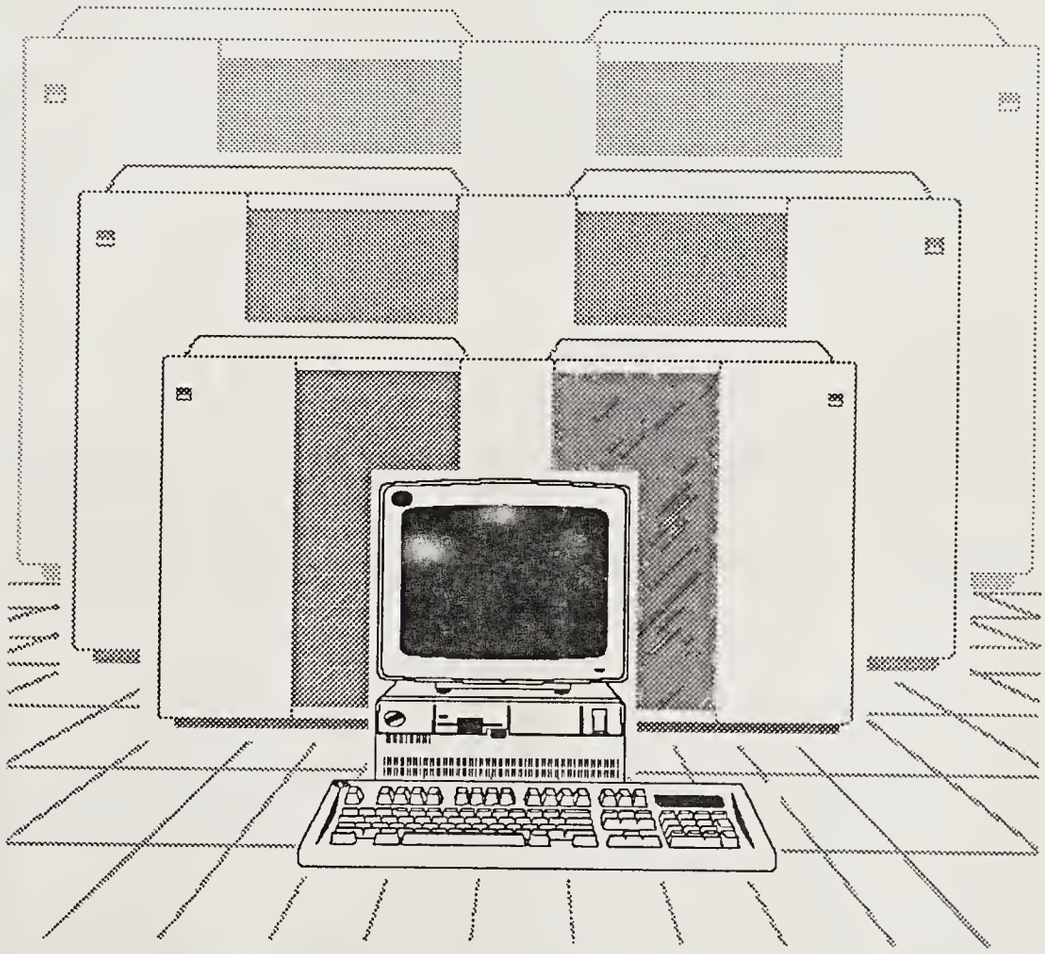
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What is *Your* Plan for Downsizing?



5 In-depth case studies to help you...

- Model the success of others
- Avoid costly mistakes

The Downsizing Revolution...

Is Your Company Ready to Capitalize?

Before you invest in downsizing technology—get the "big picture"

Not since the introduction of the personal computer has there been a technology concept with the potential to revolutionize businesses and the information systems organizations that serve them.

But before rushing to decisions on the technology of downsizing—SAA versus open systems, RDBMS choices, LAN interconnects—get the big picture. Learn from the experience of companies that have downsized: their motivations for downsizing, the real costs, organizational impacts and why they chose alternative technologies.

Plan your strategy on real research... the experience of your peers

Pick up any computer trade publication and you'll find every opinion imaginable on the downsizing phenomenon. Who do you believe?

Give yourself and your company the benefit of primary market research... in-depth interviews with executives who took the risk of downsizing their information systems. Learn from those who've lived it, not just those who talk about it.

INPUT's report, *Case Studies in Downsizing*, gives you the information necessary to make sound decisions. Before your invest in downsizing, invest in this report.

Case Study #1
Modeling Costs of Downsizing

Case Study #2
Rightsizing the Information Architecture

Case Study #3
Proprietary versus Open Systems

Case Study #4
Downsizing and the Fight for Survival

Case Study #5
Actual Transition to a Downsized Environment

What are the ***real*** costs? Can the organizational impact be minimized? How difficult is the transition? What were the expected benefits—and the results? In the final analysis, did the IS budget shrink? These questions and many more are answered by IS executives who have taken on the downsizing challenge.

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Data Quality and Security in Downsized Environments INPUT research shows that data quality and security are the major impediments to the adoption of downsizing. This project investigates the methods by which these problems can be overcome. User needs are analyzed and the opportunities for vendors and IS organizations identified.

Methodologies for IT Downsizing—Addresses: How do organizations go about IT downsizing? Who initiates the process and how is it carried out? What are the costs and how long does it take? What are the evaluation criteria? Who is involved in the decision and vendor selection?

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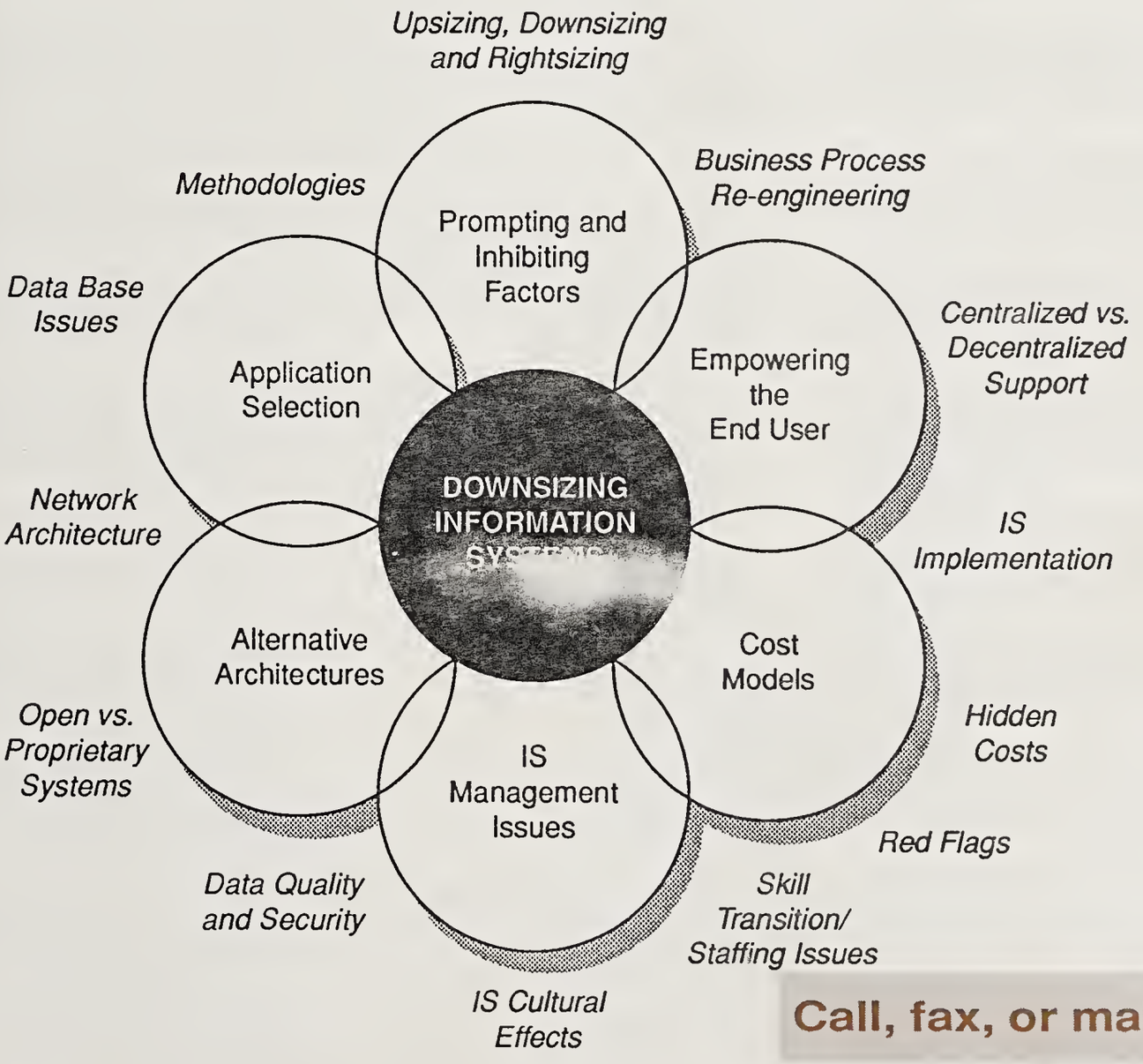
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Understand the Management Process of Downsizing

INPUT's case studies highlight downsizing as a process to be managed, not just a series of technology decisions on data bases, front ends and workstations. Take a look at the diagram below... do your plans for downsizing take into account all these related elements? Can you learn from IS managers who took on the challenge and succeeded?



Plan Your Management Strategies With *Case Studies in Downsizing*

- Learn how organizations managed in the process
- Avoid costly mistakes
- Develop a strategy for success

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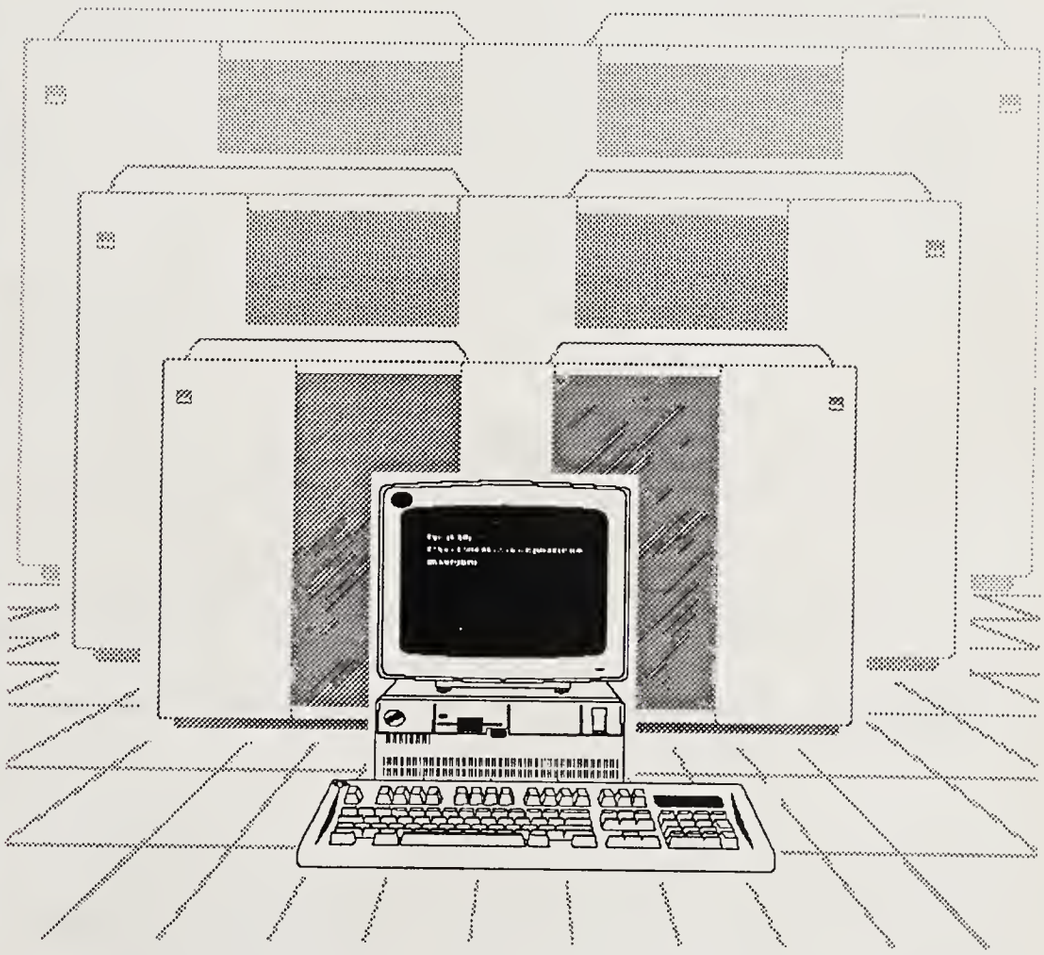
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Five In-depth Case Studies on Downsizing...



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The Downsizing Revolution... Are your products and services positioned to capitalize?

Before you invest in technology or marketing plans—get the "big picture"

Not since the introduction of the personal computer has there been a technology concept with the potential to revolutionize businesses and the information systems organizations that serve them.

But before rushing to decisions on the technology of downsizing—SAA versus open systems, RDBMS choices, LAN interconnects—get the big picture. Learn from the experience of companies that have downsized: what were their motivations for downsizing, the real costs, organizational impacts and why they chose alternative technologies. And more importantly, learn if their results met their expectations.

Plan your strategies on real-life cases and hard data

One thing is certain—experience is the best teacher. No matter how many theories industry pundits may pose on downsizing, the real lessons to be learned are from users that have done it.

INPUT provides this experience in its latest report, *Case Studies in Downsizing*. It offers the details you need to plan successful product or service strategies—uncovering the motivations of users, their cost assumptions, issues in transition and ultimate results. This report highlights the successes and the failures, so that their experience will be the best teacher for your strategies. Get the facts. Learn from real-life case studies. Study the research that can make a real difference in how your company capitalizes on the downsizing revolution!

Case Study #1
Modeling Costs of Downsizing

Case Study #2
Rightsizing the Information Architecture

Case Study #3
Proprietary versus Open Systems

Case Study #4
Downsizing and the Fight for Survival

Case Study #5
Actual Transition to a Downsized Environment

What were the costs? Were IS expenses reduced? What role did the end user play? How difficult was the transition? These questions and many more are answered by INPUT in its latest report, ***Case studies in Downsizing.***

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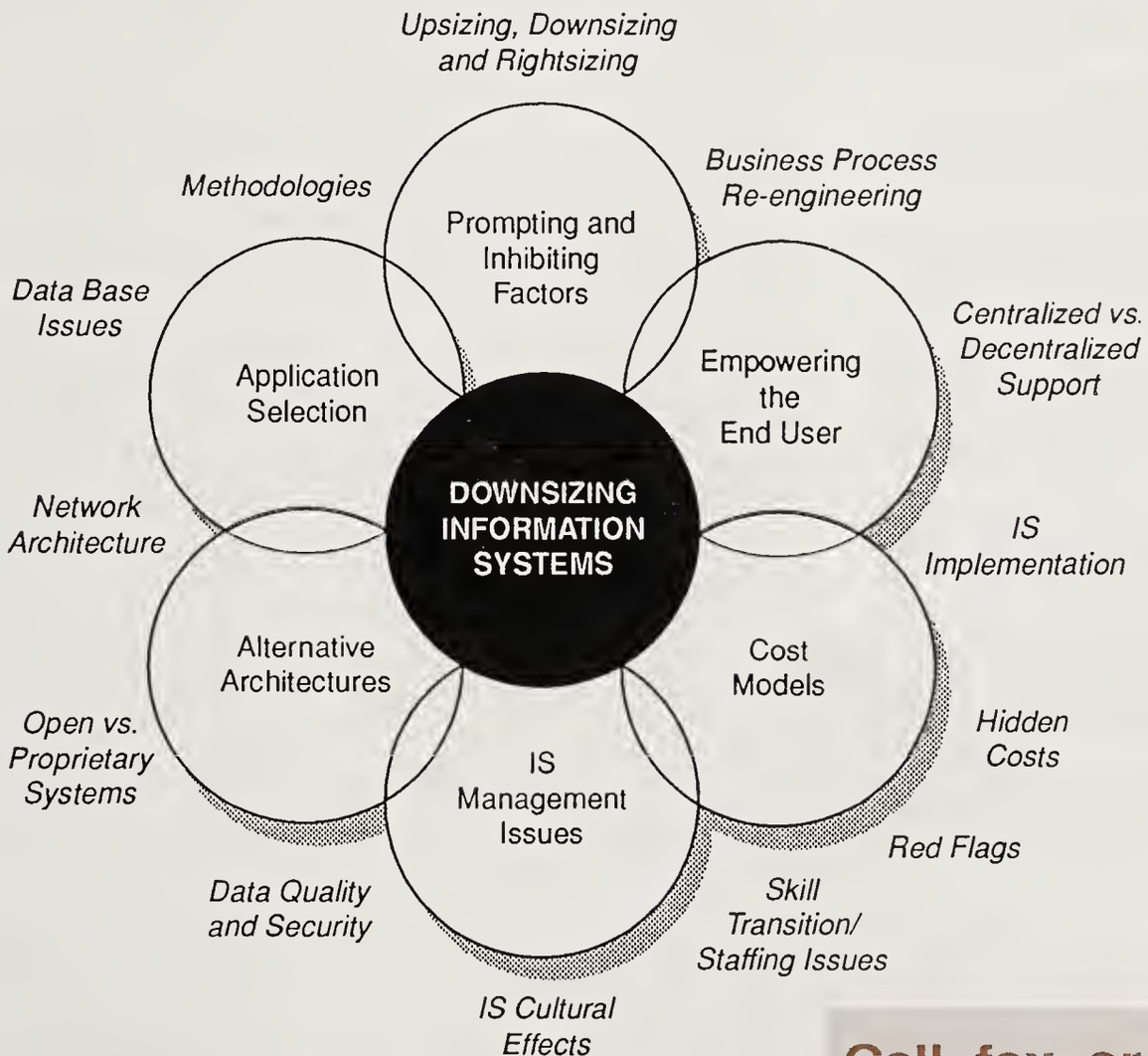
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Understand the Management Process of Downsizing

INPUT's case studies demonstrate that successful organizations view information systems downsizing as a process to be managed, ***not*** a series of technology decisions. Vendors that understand the process and design product and service strategies around the downsizing process have the greatest opportunities.

Does your company understand the management process of downsizing? Do your products and service plans reflect this end-user perspective?



Focus Your Product and Service Strategies with *Case Studies in Downsizing*

- Learn how IS management views downsizing
- Capitalize on successful experiences
- Avoid costly mistakes

Call, fax, or mail your order to your nearest INPUT office

About INPUT

INPUT is a worldwide consulting and market research firm uniquely focused on the information technology services and software markets. Executives in many technically advanced companies in North America, Europe, and Japan rely on INPUT for data, objective analysis, and insightful opinions to support their business plans, market assessments, and technology directions. By leveraging INPUT's considerable knowledge and expertise, clients make informed decisions more quickly, and benefit by saving on the cost of internal research.

Since 1974, INPUT has compiled the most extensive research base available on the worldwide information services market and its key segments, providing detailed market forecasts, vertical industry sector analysis and forecasts and analysis of vendor strategies and products. INPUT delivers specific expertise in the fast changing areas of outsourcing, systems integration, EDI/electronic commerce, software development/CASE, and on the impact of downsizing.

Consulting services are provided by more than 50 professionals in major international business centers. Clients retain INPUT for custom consulting/ proprietary research, subscription-based continuous advisory programs, merger/ acquisition analysis and detailed studies of U.S. federal government IT procurements.

Most clients have retained INPUT continuously for a number of years, providing testimony to INPUT's consistent delivery of high-value solutions to complex business problems. To find out how your company can leverage INPUT's market knowledge and experience to gain a competitive edge, call us today.

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INPUT®

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Fax (415) 961-3966

Dear Colleague:

During the last year, INPUT has been conducting a comprehensive research program on downsizing. We started by saying that downsizing was a good example of what Winston Churchill must have had in mind when he referred to "terminological inexactitude." We still don't like the term, but downsizing is not going to go away. It is the most important technological and management phenomenon of the 1990s.

INPUT has described downsizing as an ongoing revolution, and like most revolutions it is difficult to determine what the outcome and impacts will be. For example:

- How does management expect to cut information systems costs while deploying the additional information technology necessary to transform central bureaucracies into the "leaner and meaner" organizations required by the global competitive environment?
- How can the IS department be motivated to maintain an old information architecture while simultaneously developing (and perhaps having to invent) a new one that may downgrade the role of IS in the corporate structure?

The primary downsizing *riddle* is: "What is it that must go down when it goes up, and must go up when it goes down." The answer is: "Data in a client/server environment."

The main conclusion reached from INPUT's research thus far has been that downsizing places the IS function squarely between the proverbial "rock and a hard place." There are unprecedented technical and management challenges on the road to downsizing. The purpose of the enclosed questionnaire is to determine how you intend to manage the downsizing trend in your organization, and the methodologies you will employ in implementing a new information architecture.

INPUT believes the enclosed questionnaire is unique in that it provides, as well as elicits, valuable information. We justify the questions based on our past downsizing research, and we will provide you with a summary of the results if you will be kind enough to complete and return the questionnaire to us.

Thank you for your cooperation in this important research project.

Sincerely,

R. Dennis Wayson
Vice President

Information Systems Questionnaire: Methodologies and Management of the Downsizing Process

As part of its Downsizing Information Systems Program, INPUT is conducting extensive research on the challenges and opportunities afforded by the trend toward downsizing. This particular questionnaire emphasizes the management of the downsizing process, and how that process has been (or will be) managed. It should be completed by the corporate function (or individual) responsible for developing the downsizing strategy.

Your answers to these questions, combined with other research being conducted, will provide valuable information on how experienced IS executives are managing the downsizing process to achieve anticipated benefits.

Please return your completed questionnaire with your address by September 4, 1992 to:

R. Dennis Wayson, INPUT, 1280 Villa Street, Mountain View, CA 94041

To receive a summary of the survey's findings, please provide your name and address.

Name: _____ Title: _____

Company: _____

Address: _____

City: _____ State: _____ ZIP: _____

Phone: _____

Thank You,
R. Dennis Wayson
Vice President

Demographics

1a. What is your position/title? _____

1b. Which of the following describes your information systems organization?

____ Corporate IS ____ Division IS

2. In which of the following industries is your organization?

___ Discrete Manufacturing
___ Process Manufacturing
___ Transportation
___ Utilities
___ Telecommunications
___ Retail Distribution
___ Wholesale Distribution
___ Other (Specify) _____
___ Insurance
___ Medical
___ Education
___ Services
___ Federal Government
___ State & Local Gov't
___ Banking & Finance

3. What is the revenue of your organization?

a. Revenue

___ Over $10 Billion
___ Over $1 Billion
___ Over $500 Million
___ Over $100 Million
___ Over $50 Million
___ Under $50 Million

b. Number of Employees

___ Over 10,000
___ Over 5,000
___ Over 1,000
___ Over 500
___ Under 500

4. What is the size of your organization's information systems expenditures?

___ Over $500 Million ___ Over $100 Million ___ Over $50 Million
___ Over $10 Million ___ Over $5 Million ___ Under $5 Million

Downsizing Goals and Objectives

5. INPUT's previous downsizing research disclosed that while cost savings was one of the primary factors initially prompting downsizing, it was not anticipated that such benefits would actually materialize from downsizing projects that were actually under way.

 Please *rank* the following objectives of downsizing in order of their importance to you. (Rank them 1 through 5, with 1 being the most important objective, 2 next in importance, and 5 the least important.)

	Ranking
Better management information	_____
Higher office (white collar) productivity	_____
Increased user control of information technology	_____
Lower data center (hardware & software) costs	_____
Lower application development costs	_____

 Now *rank* what you believe to be the primary objectives of corporate executives and end users in pursuing downsizing of information technology.

	Rankings	
	Corporate Executives	End Users
Better management information	_____	_____
Higher office (white-collar) productivity	_____	_____
Increased user control of information technology	_____	_____
Lower data center (hardware & software) costs	_____	_____
Lower application development costs	_____	_____

6. As part of corporate downsizing, the corporate planning and control functions supported by large centralized data bases are being cut back severely in favor of decentralization of these functions to line organizations. How would you *rate* corporate management's current satisfaction with the performance of the following corporate functions on a scale of 1 to 5 (with 5 being extremely satisfied, 4 being very satisfied, 3 being satisfied, 2 being dissatisfied, and 1 being very dissatisfied).

	Satisfaction Rating (5 high, 1 low)
Market research and forecasting	_____
The quality of management reports	_____
Corporate controller audit functions	_____
The general quality of corporate data bases	_____
The responsiveness of IS to ad hoc requests	_____
The effectiveness of investment in information technology	_____
The usefulness of corporate strategic plans	_____
The cost of mainframe applications development	_____
The cost of mainframe hardware/software	_____
The ability of corporate IS to respond to market changes	_____
Corporate decision support systems	_____
Corporate use of personal computers and workstations	_____

Organizing and Managing the Downsizing Process

7. Regardless of whether the downsizing trend is driven by technology or management initiative, new information architectures will result in changing roles for: corporate management, IS management, end users, and outside services (consultants, information services, and processing services). Whether the impetus to downsize is the result of a corporate power struggle, enlightened management, the computer trade press, the latest business school theories, or an outside consulting firm; the result will be shifting responsibilities for planning, implementing and maintaining the new information architecture.

 There is no "right" or "wrong" way to organize, manage, and control the downsizing process because it depends upon the relative strengths and weaknesses of the existing organization. Please indicate the degree of involvement of: a) corporate management, b) IS management, c) end users, and d) outside services (SRVS) in the following phases of the downsizing process. Outside services include: consultants, information services, processing services, software product vendors. (Place a double check mark (✓✓) for the organization with primary responsibility, a single check (✓) for those involved, and leave those not involved blank. See example.)

	Corp. Mgmt. (a)	IS Mgmt. (b)	End Users (c)	SRVS (d)
(Example) Controlling the stock option system	✓✓	✓		
Initiating the downsizing effort				
Cost/benefit analysis for the downsizing effort				
Cost/benefit analysis for specific applications				
Planning the downsizing effort				
Selecting client (workstation) hardware				
Selecting client operating system(s)				
Selecting client software packages				
Selecting server (work group) hardware				
Selecting server operating system(s)				
Selecting other server software				
Management of downsizing project(s)				
Oversight of overall downsizing process				
Implementing applications downsizing				
Implementing data base distribution				
Systems and network integration				
Testing and quality control				
Training				
Wide-area network operation and maintenance				
Local-area network operation and maintenance				
Mainframe applications maintenance				
Server applications maintenance				
Client applications maintenance				

Data Structure and Quality Control

8. INPUT research disclosed that a primary impediment to downsizing was concern about data base quality (integrity, synchronization, and security). It is also true that responsibility for data quality implies control of usage (data flow); and this, in turn, represents control of the dependent information systems. Data and information represent power. In addition, those who make use of data have a responsibility for understanding the quality of the information produced from the data, and therefore, become involved in the quality control process. (This is especially important when downsizing results in the elimination of middle management layers that may have added value to the information flow through knowledge of the underlying data.)

 Please indicate the degree of responsibility for data quality control as downsizing proceeds. (Use a double check (✓✓) for primary responsibility, a single check (✓) for some responsibility, and leave those without responsibility blank.)

	Corp.Mgmt. (a)	IS Mgmt. (b)	End Users (c)	SRVS (d)
Selection of DBMSs for mainframe data bases (if any)				
Data base administration for mainframe DBs				
Selection of DBMSs for server data bases				
Data base administration for server DBs				
Selection of DBMSs for client data bases				
Data base administration for client DBs				
Planning data bases				
Operational (transaction) data bases				
Archival data bases				
Highly secure data bases				
Backup data bases (disaster)				

Cost and Funding Considerations

9. While cost savings are one of the primary factors prompting downsizing, it seems inevitable that there must be some additional funding—especially during the downsizing transition period. Please indicate the primary source and destination of funding, and the source of *anticipated* savings from downsizing. (Once again, double check (✓✓) the primary source or target, single check (✓) any involved, and leave blank if it does not apply.)

	Corp. Budget (a)	IS Budget (b)	End Budget (c)	SRVS Exps. (d)
Source of downsizing transition funds (through budget and headcount transfers, or reduced outside expenditure)				
Destination of downsizing transition funds (additions to budgets, or outside expenditures)				
Sources of anticipated hardware savings				
Sources of anticipated software savings				
Sources of applications development savings				
Sources of applications maintenance savings				
Sources of data base administration savings				
Sources of savings from improved productivity (reduced headcount)				

Personnel Management

10. Few organizations have adequate staff to maintain existing systems, retrain existing employees so they can function more effectively in the downsized environment, and implement an aggressive downsizing program. Please check which of the following best describes your approach to personnel management in order to implement downsizing.

	IS	User	SRVS
Responsible for operation of existing systems	_____	_____	_____
Responsible for implementing new applications before downsizing	_____	_____	_____
Responsible for maintenance of existing software	_____	_____	_____
Responsible for data base management and administration of existing data bases	_____	_____	_____
Responsible for operation of downsized systems	_____	_____	_____
Responsible for implementing new applications after downsizing	_____	_____	_____
Responsible for data base management and administration of distributed data bases	_____	_____	_____
Responsible for maintenance of downsized applications systems	_____	_____	_____
Requires most training (or retraining)	_____	_____	_____
Responsible for providing training	_____	_____	_____

Approaches to IT Downsizing

11. Please check which of the following best describe the approach you will take in implementing downsizing. (Check as many as apply.)

Aggressively replace mainframe platform(s)	_____
Carefully select specific applications for downsizing	_____
Quick and dirty conversion of application systems	_____
Distribute processing, retain central data bases	_____
Distribute data base administration function to users	_____
Re-engineer applications as downsizing proceeds	_____
CASE tools to play significant role in downsizing	_____
SAA will play a significant role in downsizing	_____
Provide data access, turn LAN responsibility over to users	_____
Users budget and pay for hardware and software on LAN	_____
Standardize on operating systems at each processing level	_____
Standardize on DBMS at each processing level	_____
Open systems will be the foundation of downsizing	_____
Mainframe processing to be outsourced as downsizing proceeds	_____
Adjust mainframe billing to cover decreased use	_____

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12. Please rate the following in terms of their importance to your downsizing effort (5 being essential, 4 being very important, 3 being important, 2 being not important, and 5 being unnecessary.)

	Rating
A good relational data base management system (DBMS)	_____
IBM's Systems Application Architecture (SAA)	_____
An open systems environment	_____
Object-oriented programming tools	_____
Good CASE tools	_____
A good C+...n compiler	_____
A good 4th generation language (4GL)	_____
Artificial intelligence	_____
Expert systems	_____
A good graphics user interface (GUI)	_____
A good report program generator (RPG)	_____
Microsoft Windows and NT	_____
A distributed data base manager	_____
A good structured methodology	_____
Good network management for LANs	_____
Good network management for WANs	_____
Performance measurement and prediction tools	_____
Consulting and outside services	_____
Good packaged software	_____

Current Status of Methodology and Tools

13. Please indicate and identify which of the following you either have installed or plan to install in support of your downsizing effort. (Use a check mark (✓) for those already installed, and an ✘ for those you intend to install.)

		Name
13a.	_____ Mainframe operating system(s)	_____
13b.	_____ Server operating systems(s)	_____
13c.	_____ Client operating system(s)	_____
13d.	_____ Network architecture(s)	_____
13e.	_____ Mainframe DBMS(s)	_____
13f.	_____ Server DBMS(s)	_____
13g.	_____ Client DBMS(s)	_____
13h.	_____ CASE tools and/or methodologies	_____
13i.	_____ Languages and RPGs	_____
13j.	_____ Network managers and routers	_____
13k.	_____ Object-oriented development tools	_____
13l.	_____ Other tools employed	_____

13m.	_____ Outside services used (or to be used) (outsourcing, information services, systems integration, consulting)	_____

Results

14. INPUT recognizes the difficulty of projecting the costs and savings associated with downsizing. However, we would appreciate your indicating the results you have either achieved or expect to achieve as a result of your downsizing efforts.

14a. Type and number of mainframes (or other systems) replaced, or due to be replaced:

14b. Type and number of downsized platforms used, or due to be used, as replacements:

14c. Length of downsizing transition period:

14d. Costs, or anticipated costs, of downsizing transition:

New or upgraded hardware _____

New or upgraded software _____

Upgraded network _____

Personnel costs (including training) _____

Other _____

14e. Anticipated (or actual) savings resulting from downsizing:

Reduced hardware costs _____

Reduced software costs _____

Reduced application costs _____

IS staff savings _____

Other staff savings _____

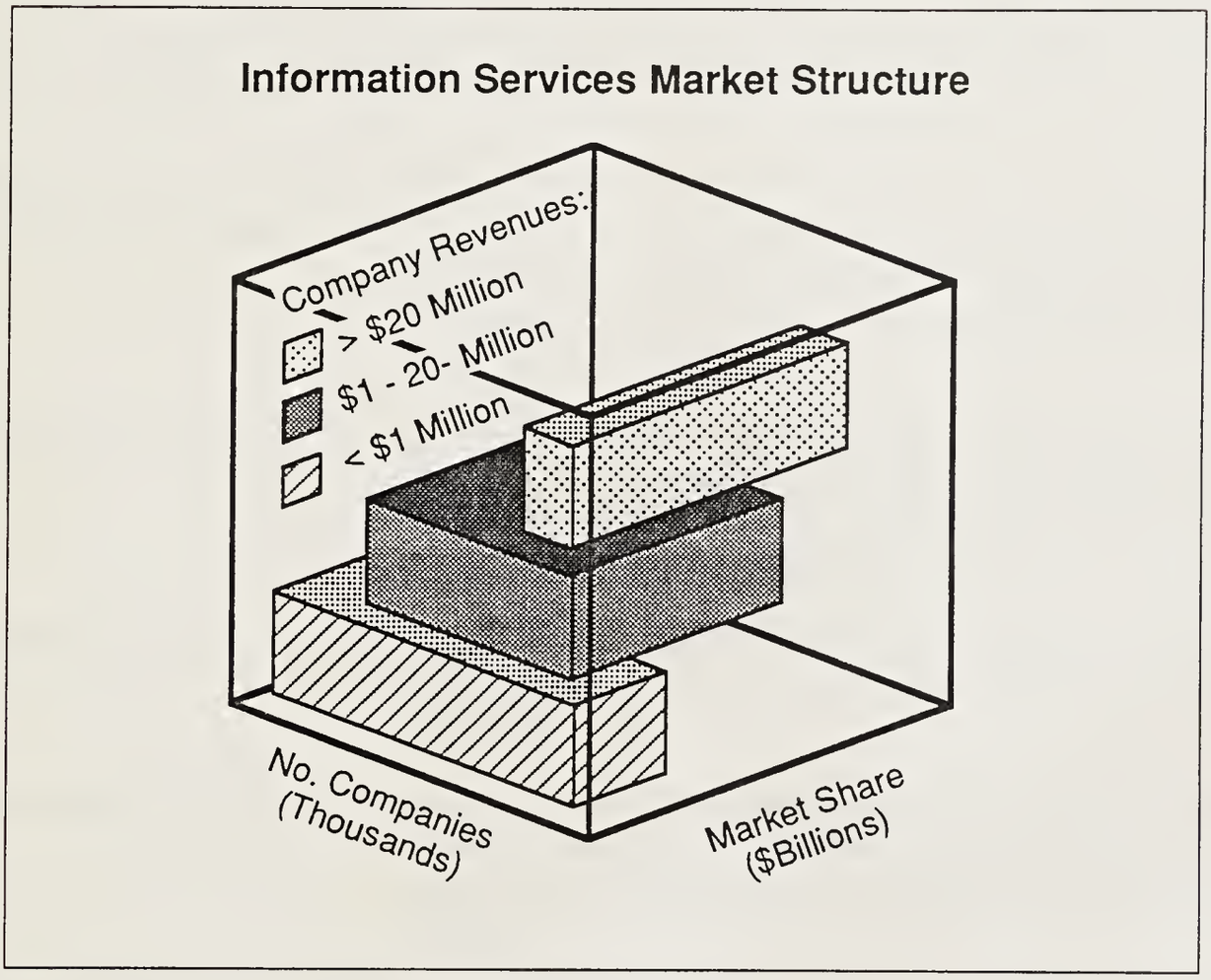
Other _____

15. Any other comments you may have:

CVVAP

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Information Services Vendor Analysis Program



Guide to the U.S. systems, software, and services vendors—public, private, and hidden. Supports competitive analysis and partnering activities.

- Systems Software Products
- Applications Software Products
- Turnkey Systems
- Equipment Services
- Professional Services
- Systems Integration
- Systems Operations
- Processing Services
- Network Services

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INPUT®

Information Services Vendor Analysis Program

SUMMARY

Guide to the information systems, software and services vendors—public, private and hidden. Supports competitive analysis and partnering activities.

Company Data Base	Data base of over 3,000 public, private, and 'hidden' information services vendors in North America, Europe, and Asia. 'Hidden' vendors include divisions of larger companies.
Company Profiles	Detailed descriptions of companies, their performance, markets, and products. ***Clients select companies to be profiled.*** INPUT selects additional leading vendors. Over 400 vendors are profiled each year.
Research Library	Comprehensive research library of vendors offering information systems and services in the U.S., Europe, and Japan.
Information Access	Obtain answers to your immediate questions on vendors and their activities by telephone, fax, mail, or meetings. Investigate companies for acquisition, partnering, and teaming

SERVICES

Access to INPUT Consultants	Obtain opinions and advice from INPUT executives and consultants.
Access to Research Library	INPUT's comprehensive research library to gather information on vendors, potential partners, and market trends.
Conference	Review the state of the industry and network with executives from other INPUT clients.

Information Services Vendor Analysis Program

BACKGROUND and BENEFITS

Along with the fast-paced growth of the information services industry there has been an explosion in the number of vendors providing software products and services. Each year new vendors emerge and gain industry recognition while established vendors change their core strategies.

This explosion has resulted in:

- Fragmentation of the market
- Fast changing strategies
- Significant merger, acquisition and alliance activity

The result is that it has become very difficult and time-consuming to keep in touch with what competitors and potential competitors are doing. It is equally difficult to identify the best alliance partners. Keeping up can be more than a full-time job.

INPUT's **Vendor Analysis Program** simplifies these tasks. It provides profiles of hundreds of vendors and access to information on thousands more.

Find the Competition	Identify vendors. Gain up-to-date information on companies entering markets.
Know the Competition	Identify competitors' changes in strategy, affiliation, products, and services. Get tactical profiles of the companies you need to watch. **You can specify companies you want profiled and tracked.**
Monitor Vendor Performance	Track the performance of individual vendors and market groups to determine winning and losing tactics and strategies.
Find Partners	Target companies for potential alliances.
Consulting Experts	Build a relationship with INPUT's professional staff. Test ideas, inquire about vendors and gather data.
Marketing	Promote your company using your Vendor Profile—INPUT's balanced assessment of your company.

Information Services Vendor Analysis Program

PROGRAM DESCRIPTION

The **Information Services Vendor Analysis Program** has provided valuable profiles of leading and emerging information services vendors for 15 years, giving subscribers ready access to consistently high-quality information on potential partners and competitors. It provides a single source and a complete overview of the U.S. market.

The program contacts, interviews, assesses and profiles companies and keeps the information up to date. The profiles provide: location and contacts, multiyear financial charts, strategy, products, current events, alliances, and market segmentation.

Over 400 profiles are provided in easily accessible electronic and printed form.

Companies are classified by markets served, industries served, ownership, and size.

New and updated profiles are issued monthly.

RELATED PROGRAMS

Information Services Market Analysis Programs (U.S. and Europe) provide forecasts, trend analyses, and industry reports for software products, professional services, turnkey systems, processing services, and network services.

Outsourcing Information Systems Programs (U.S. and Europe) provide research on the revolution in systems operations, network operations, applications management and desktop services opportunities.

Systems Integration Programs (U.S. and Europe) analyze opportunities for vendor-provided solutions to complex information systems, communications, and automation requirements.

Custom Research and Consulting Services satisfy unique needs for market research, competitive analysis, IS strategy development, acquisition support and other tasks based on INPUT's extensive experience and information resources.

INPUT®

Information Services Vendor Analysis Program

CLIENT SUPPORT SERVICES

Clients gain maximum benefit from the industry research and consulting services available to them through the development of a strong, continuous relationship with INPUT staff. Through frequent contact and sharing of opinions and ideas, you receive a flexible response to changing areas of interest and focus. INPUT provides the following specific services in order to build a full relationship:

Telephone Inquiry Service

Satisfies requirements for short-term research needs (less than two hours). This service is particularly useful for finding out more about specific companies. Typical types of information requested include:

- Provide information on a vendor (brochures, revenues, and subsidiaries)
- Identify companies offering a product or service
- Contact point and person, including international contacts
- Identify alliances of a particular company
- Describe a new product offering

Consultant Access

Continuous support from INPUT's consultants and executives who are available to share opinions and reactions to events, and to discuss ideas and challenges.

Site Subscriptions

Complete program services to additional sites at substantially reduced fees.

Research Library Access

Use INPUT's comprehensive library to perform your own research.

For more details please contact your nearest INPUT office.

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Tokyo Tel. (03) 3864-0531; Fax (03) 3864-4114

Information Services Vendor Analysis Program

PROFILE DESCRIPTION

Information Services Vendor Analysis Program company profiles provide:

- Contact details (company name, address, telephone and fax numbers, name of Chief Executive Officer or other principal contact)
- Company overview with history and business focus
- Ownership
- Five-year financial review
- Discussion of recent events
- Review of current strategy
- Review of key products and services
- Acquisitions and alliances
- Company markets—by industry sectors, geographically, and INPUT classifications

Companies are indexed by: (see Scope of Services)

- 9 delivery modes
- 15 industry sectors
- 7 cross-industry sectors

Profiles are generally updated annually based on the company's fiscal year, more often based on changes in a company's situation. Profiles are shipped every month with an updated Table of Contents.

Clients can request profiles on specific companies.

Information Services Vendor Analysis Program

SCOPE OF SERVICES

9 DELIVERY MODES

- Systems Software Products
- Applications Software Products
- Turnkey Systems
- Equipment Services
- Professional Services
- Systems Integration
- Systems Operations
- Processing Services
- Network Services

15 INDUSTRY SECTORS

- Discrete Manufacturing
- Process Manufacturing
- Transportation
- Utilities
- Telecommunications
- Retail Distribution
- Wholesale Distribution
- Banking and Finance
- Insurance
- Health Services
- Education
- Business Services
- Federal Government
- State and Local Government
- Miscellaneous Industries

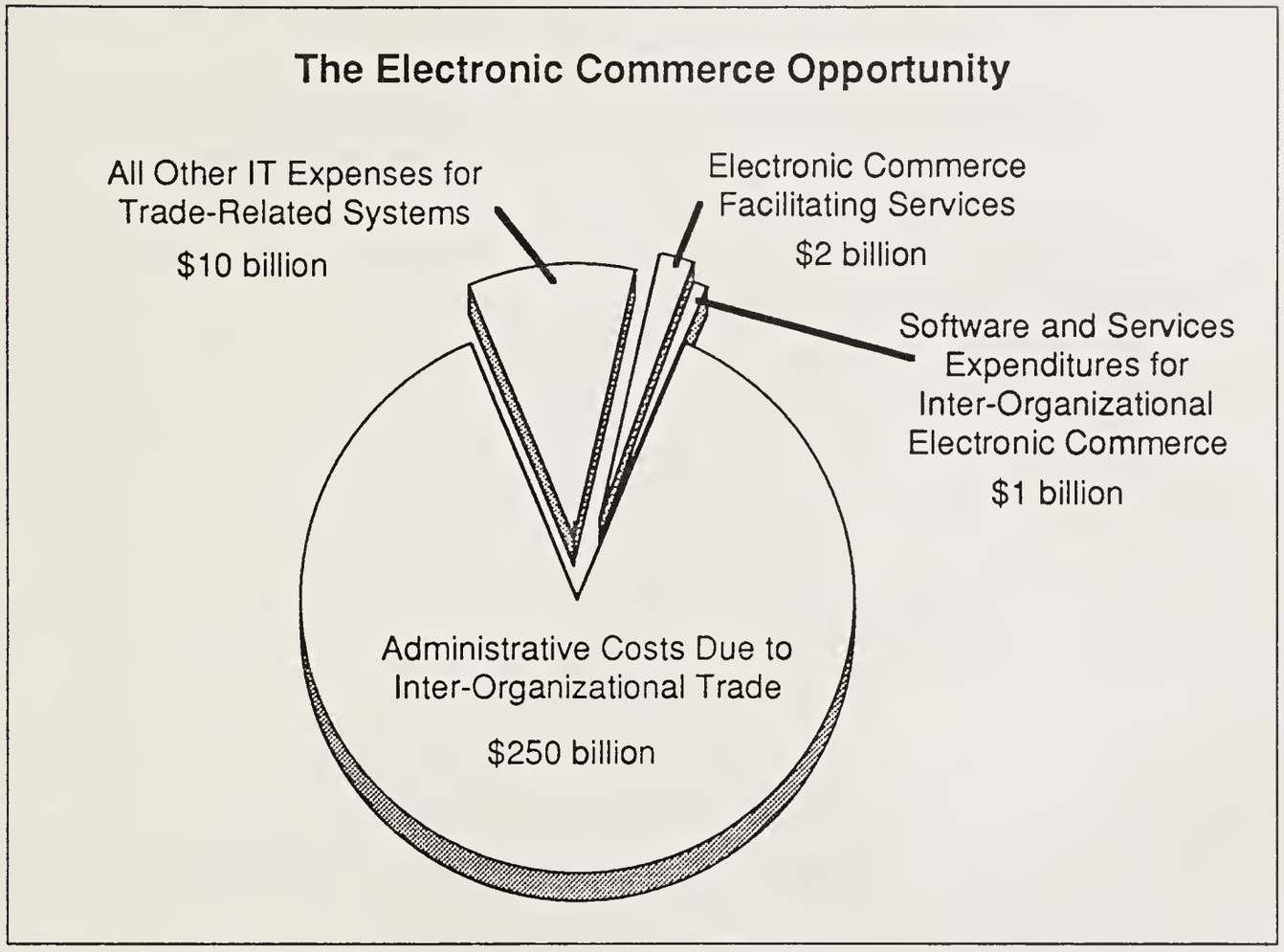
7 CROSS-INDUSTRY SECTORS

- Accounting
- Education and Training
- Engineering and Scientific
- Human Resources
- Office Systems
- Planning and Analysis
- Other

EDEDI

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EDI and Electronic Commerce Program



Examines the marketing, competitive, and economic issues of the movement from paper to electronic-based commerce.

- **Electronic Data Interchange**
- **Point-of-Sale Data Applications**
- **Interactive Voice Response and Facsimile Systems**
- **Reservation Systems**
- **Buy/Sell Electronic Bulletin Boards**
- **Electronic Trade Payments**
- **Electronic Information Services for Commercial Transactions**
- **Automatic Identification Technologies**
- **Automated Trading Systems**
- **Electronic Mail Used for Trade**

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EDI and Electronic Commerce Program

—Re-engineering Value Chains through Information and Communication Systems—

SUMMARY

Examines the marketing, competitive, and economic issues of the movement from paper to electronic-based commerce.

REPORTS

U.S. Electronic Data Interchange Market Report, 1992-1997

EDI/Electronic Commerce Vendor Profiles and Analysis

International Electronic Data Interchange Markets

Electronic Commerce: The New Foundation for Trade

Electronic Commerce in —

- *U.S. Health Care*
- *Trade and Transportation*
- *U.S. Federal Government*
- *Grocery Production and Distribution*
- *Apparel Production and Distribution*
- *Media Industry*
- *Travel and Tourism*
- *Finance and Insurance*

Electronic Commerce: Comprehensive Market Assessment

Industry Newsletter

The *EDI Reporter* (monthly). Up-to-date coverage and analysis of applications, products, and services, including comparisons of competing systems, results from ongoing research, and company profiles.

SERVICES

Telephone Inquiry

Use the "hotline" to obtain answers to your immediate questions.

Access to INPUT Consultants

Obtain opinions and advice from INPUT executives and consultants from meetings, mail, fax, and the telephone.

On-Site Visit

Discuss your issues and concerns, introduce experts to your organization, and obtain presentations on industry trends.

Conference

Review the state of the industry and network with executives from other INPUT clients.

EDI and Electronic Commerce Program

BACKGROUND and BENEFITS

Electronic Data Interchange (EDI), the computer-to-computer exchange of intercompany business information in structured electronic data formats, is growing beyond its mainstream applications in manufacturing and distribution. Universities, building contractors, and movie theatres, for example, are using EDI in non-procurement applications.

In addition, the architecture of EDI systems is changing to incorporate new technologies and associated services.

The convergence and integration of systems is allowing an "electronic commerce" to emerge. Electronic commerce is the use of interorganizational electronic systems to facilitate the many kinds of communications involved in a commercial transaction.

Electronic commerce is playing a major role in re-engineering not just companies but the value chain, or "trading community," in which these companies operate. A trading community is the group of organizations involved in producing a good or service.

Keep on Top of this Dynamic Environment	Avoid surprises, avoid wasted effort. Target your market offerings and activities to fulfill customer needs.
Opportunity Identification	Identify user requirements and "hot" market issues. Make informed decisions. Focus on the needs of individual organizations and whole trading communities.
Plan Re-engineering	Determine from examples how to re-engineer your organization and trading community interfaces. Attack bureaucracy and administrative overhead.
Buying Strategy	Effectively time your information technology investments. Identify, compare, and negotiate information technology purchases.
Consulting Support	Build a professional support relationship with INPUT's experienced consultants. Test marketing ideas, strategies and tactics. Obtain market and vendor insights.
Networking	Develop working relationships with complementary electronic commerce vendors through client conferences and INPUT staff introductions.
Marketing	Promote your company's capabilities and interests through INPUT's worldwide client and contact network.

EDI and Electronic Commerce Program

PROGRAM DESCRIPTION

This program provides quantitative and qualitative information about the markets for EDI and electronic commerce systems. Through interviews and surveys of users and vendors of these systems, the **EDI and Electronic Commerce Program**:

- Forecasts user expenditures on information systems to support EDI and electronic commerce
- Examines the costs and benefits of such systems
- Defines and discusses the requirements and issues users are dealing with in implementing EDI and electronic commerce
- Profiles the participants and trade flows within a targeted trading community. Describes the application of EDI and electronic commerce systems in facilitating these trade flows.
- Looks at the impact of electronic commerce on trading communities. Examines how electronic communication systems reconfigure and alter the costs of transactional interfaces among organizations.
- Identifies and profiles vendors; assesses their offerings, pricing, and competitive position.
- Identifies opportunities for electronic services based on needs of the trading community as well as the needs of individual participants within the community.

RELATED INPUT PROGRAMS

Information Services Vendor Analysis Program provides profiles and capabilities analyses of information services vendors.

Information Services Market Analysis Programs (U.S. and Europe) provide forecasts, trend analyses, and industry reports for software products, professional services, turnkey systems, processing services, and network services.

Outsourcing Information Systems Programs (U.S. and Europe) provide research on the revolution in systems operations, network operations, applications management and desktop services opportunities.

Custom Research and Consulting Services satisfy unique needs for market research, competitive analysis, IS strategy development, acquisition support and other tasks based on INPUT's extensive experience and information resources.

EDI and Electronic Commerce Program

CLIENT SUPPORT SERVICES

Clients gain maximum benefit from the industry research and consulting services available to them through the development of a strong, continuous relationship with INPUT staff. Through frequent contact and sharing of opinions and ideas, you receive a flexible response to changing areas of interest and focus. INPUT provides the following specific services in order to build a full relationship:

Consultant Access	Continuous support from INPUT's consultants and executives who are available to share opinions and reactions to events, and to discuss ideas and challenges.
On-site Presentation	INPUT consultants present and discuss research findings at your site. Research presentations can be tailored to focus on your needs. Discuss specific interests and issues in confidence. This presentation is an excellent method of distributing key information through the organization and of obtaining more users of the research materials.
Telephone Inquiry Service	Satisfies requirements for short-term research needs (less than two hours), and clarification/amplification of report and presentation data.
Site Subscriptions	Complete program services to additional sites at substantially reduced fees.

For more details, please contact your nearest INPUT office.

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Tokyo Tel. (03) 3864-0531; Fax (03) 3864-4114

EDI and Electronic Commerce Program

REPORT DESCRIPTIONS

U.S. Electronic Data Interchange Market Report, 1992-1997
Assesses the overall use of EDI in the U.S., where and how it is being applied in 35 industrial/commercial sectors, the concerns and practices of EDI users today, how much users are spending on EDI products and services, how much the market for these products and services will grow through 1997, who the leading vendors of these products and services are, and the market share of these vendors.

EDI/Electronic Commerce Vendor Profiles and Analysis
Profiles individual companies that provide EDI and electronic commerce products and services. The profiles cover revenues, company business lines, key products and services, product/service pricing, targeted markets, geographic markets and penetration, and strategies. The report also contains cross-comparison tables on products and services and in-depth analysis of specific issues (such as comparing price schedules of UPC catalog services, price schedules of different port EDI systems, or the differing features of vendors' mapping software).

International Electronic Data Interchange Markets
Assesses activity levels of EDI within as well as among countries. Specific areas of focus are East Asia, Europe, and North America. Identifies leading EDI-using industries in national markets as well as trans-border markets. Profiles leading user companies and trading communities in mini-case studies. Compares and contrasts user implementations and issues across national and regional markets. A full global assessment of EDI activity and systems markets.

Electronic Commerce in the Media Industry
Identifies information industry players and the commercial transactions of the players that are facilitated by electronic interorganizational systems. Assesses how technology will re-delimit the boundaries of the industry and recombine players (through integration and re-engineering) so that some of today's transactional interfaces will disappear and new ones will appear. Analyzes the technical and market requirements for developing the electronic commerce infrastructure (such as directories, standards, resolution of legal issues, network capacities, marketing and education requirements, financial requirements, etc.).

EDI and Electronic Commerce Program

REPORT DESCRIPTIONS *(Continued)*

Electronic Commerce: The New Foundation for Trade
Lays out the defining characteristics of electronic commerce systems (EDI, point-of-sale, reservation systems, securities trading systems, etc.) and their competitive implications. Draws on a number of real-world examples and analyzes the competitive implications of electronic commerce. Introduces analytical tools for re-engineering workflow and how they can also be used to analyze electronic commerce markets.

Electronic Commerce in U.S. Health Care
Examines the infrastructure that coordinates the administration of health care within the health care community (hospitals, pharmaceutical manufacturers, insurance carriers, etc.). Looks at electronic ordering systems (for pharmaceutical, medical, surgical, and grocery products), electronic medical insurance claims submission and payment, commercial data bases on health care-related subjects, and other network services that interconnect disparate players.

Electronic Commerce in Trade and Transportation
Examines electronic commerce (EDI, electronic data bases, processing services, etc.) between shippers, carriers, and service providers. Identifies major players in all modes, their corresponding trade flows, to what degree electronic systems are currently used to support these trade flows, what emergent and needed services there are to establish a solid electronic infrastructure, what the impact of electronic commerce will be and what the opportunities are for transportation and information service providers.

Electronic Commerce in the U.S. Federal Government
Discusses present and future agency procurements and identifies specific electronic commerce opportunities for vendors. Government electronic commerce programs include the Electronic Commerce program, CALS, electronic benefits transfer, EDMICS (transfer of engineering drawings), SGML (document transfer), and other formatted exchanges.

Electronic Commerce in Grocery Production and Distribution
Analyzes interorganizational systems that support grocery production and distribution, including supermarket point-of-sale card systems, electronic marketing, product movement data services, EDI, interactive voice response, home shopping networks, commodity market quotation services, and others. Contains market sizes, vendor lists and profiles, and user case studies.

EDI and Electronic Commerce Program

REPORT DESCRIPTIONS *(Continued)*

Electronic Commerce in Apparel Production and Distribution
Examines the use of EDI, data bases, EFT, credit card authorization, home shopping, and other interorganizational services that support transactions for apparel. Market sizes for specific services, vendor profiles, and case studies are included.

Electronic Commerce in Travel and Tourism
Examines the issues and markets for EDI, reservation systems, and other interorganizational systems that serve the travel and tourism industry.

Electronic Commerce in Finance and Insurance
Examines the use of interorganizational systems in the payment, insurance, and securities trading sectors of finance. Such systems as the Insurance Value-Added Network Service (IVANS), EDI/EFT payment services, and automated trading are sized in terms of activity levels.

Electronic Commerce: Comprehensive Market Assessment
Overviews the leading industries that maintain electronic commerce systems, with activity levels, user expenditures on software and services, special value-added services and applications, competitive implications, competitive environment analysis, user and vendor profiles, opportunity/threat assessment, enterprise and industry re-engineering case studies, and infrastructure analysis.

EDI and Electronic Commerce Program

EDI Reporter

For five years, INPUT's *EDI Reporter* newsletter has been covering developments in EDI applications and markets. Its new expanded focus covers the related issues of proprietary systems, electronic funds transfers, international network services, trading systems, reservation systems, electronic mail-enabled applications, and other "electronic commerce" applications. In a 12-page (average) format, the *EDI Reporter* gives insight on and analysis of the phenomenon of electronic commerce:

- Case studies of EDI/electronic commerce implementations based on personal interviews and site visits
- Product profiles of new and upcoming EDI/electronic commerce products
- Company profiles of EDI/electronic commerce product and service vendors
- Analysis of competitive issues, such as standards, that affect EDI implementation worldwide
- Empirical market data—excerpts and overviews of INPUT's EDI/electronic commerce reports are published in the newsletter. They are based on INPUT's ongoing user surveys and interviews.
- Key contacts—identify key people in the EDI/electronic commerce user and vendor communities. Every issue provides contact telephone numbers of all sources of newsletter stories.
- Graphic exhibits of business models, communication links, implementation architectures, etc. that clearly and concisely illustrate EDI/electronic commerce applications and systems
- Upcoming events such as international EDI/electronic commerce conferences and other meetings

Recent editorial themes of the newsletter included:

- Bar coding, facsimile and EDI
- RBOC/telco service offerings; electronic telephone-bill invoicing
- Financing electronic commerce infrastructures/port community systems
- Electronic tax filing
- Outsourcing and EDI
- Electronic commerce in health care
- Real-time EDI

Service Agreement

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EDI and Electronic Commerce Program

Please enter my order as described:

Subscription to INPUT's EDI and Electronic Commerce Program at the fee of $12,000.

Travel expenses for on-site presentations are additional and will be billed separately.
California Clients: Please add applicable sales tax on 25% of purchase price.

TERM OF SUBSCRIPTION—The initial term of this subscription will be for twelve (12) consecutive months beginning _____. The subscription will automatically renew for each succeeding year unless INPUT receives written notice sixty (60) days prior to the start of each renewal period. The fees for INPUT services defined in this Agreement and its attachments will be invoiced each year at INPUT fees then in effect, due and payable on or before the start of the program subscription period.

TERMS OF PAYMENT—Payment in full is due within 30 days of invoice date.

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INPUT®

Discover the New Opportunities in Transportation Electronic Commerce

Electronic Commerce in Trade and Transportation report—just released from INPUT—a must reading for...

- Heads of Information Systems Organizations
- IS Planning Executives
- Network Service Providers
- Software Developers
- Systems Integration Professionals

...anyone responsible for electronic systems

How is electronic commerce technology altering the transportation industry and its trading communities?

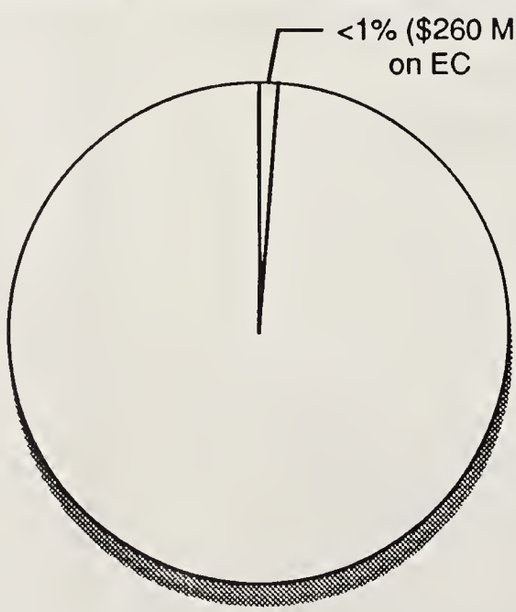
Information services providers have a tremendous opportunity to provide high-speed, reliable communications between these commercial traders including:

- Manufacturers
- Distributors
- Retailers
- Transport companies

Plan your participation in the electronification of the transportation industry with analysis and recommendations from INPUT.

Identify your best strategies for penetrating this complex market. Just released from INPUT, *Electronic Commerce in Trade and Transportation*, is packed with detailed, fact-based information.

Expenditure on Electronic Commerce as a Percentage of Total Transport Revenue



Total Transport Revenues*
$122 Billion

* For-hire freight transport only.

Source: INPUT

The report focuses on:

- Where you should aim your selling efforts
- The competitive forces that are driving the use of electronic commerce systems in the transportation industry
- The best opportunities in the transportation sector markets
- The emerging—and needed—services that will establish a solid electronic trading infrastructure

Throughout the transportation industry, carriers, shippers, transportation service companies, and government agencies are using EDI, voice response, electronic data bases, various processing services, and other inter-organizational systems to facilitate commercial exchanges.

These electronic commerce systems are changing the competitive dynamics of transport:

- In some cases, carrier consolidation is the result.
- In other cases, niches for outsourced services arise or are more effectively enabled (such as third-party logistics).
- In still other cases, new customer service opportunities become possible.

In addition, there is a whole host of issues in building this electronic infrastructure:

- Developing standards and identification codes
- Users of electronic commerce systems becoming vendors of electronic commerce systems
- Allocating the financial burdens of inter-organizational systems
- Integrating different electronic commerce systems to take advantage of synergies and streamline operations

INPUT's new report, *Electronic Commerce in Trade and Transportation* examines these issues with:

- Detailed case studies of user organizations
- Profiles of providers of electronic commerce services and systems
- Overviews of electronic trading communities (such as port systems)

Electronic Commerce in Trade and Transportation enables you to:

- Identify the electronic systems that are the most promising for revenue generation
- Discover the actual expenditures, by transport submode, for electronic commerce software
- Compare the volumes of transactions that flow into and out of the different submodes—the percent transacted electronically

Key Players

Gain a clear understanding of all the players in the electronic trading community. *Electronic Commerce in Trade and Transportation* discusses in detail:

- Leading vendors offering EDI and other electronic commerce services to the transportation industry
- Major companies utilizing various electronic formats with their trading partners
- U.S. government and international entities supporting electronic trade.

One More Reason To Order This Report

Electronic Commerce in Trade and Transportation is the most thorough examination of the changes occurring in electronic trading available today. Your plan for electronic commerce systems will be more intelligent with INPUT analysis and recommendations. As a special, one-time offer, **INPUT will give you additional support via telephone for 30 days from the day you purchase the report.** This complimentary service will add immeasurably to your planning and marketing decisions.

Report Highlights

Transport Industry—
Key Players and Trade Flows

- Transportation
- Petroleum Suppliers/Shippers
- Distribution Trading Partners
- Business Services

Electronic Commerce—
Key Transactional Interfaces

- Trucking
- Railroads
- Ocean and Water Transport
- Air Transport and Couriers
- Pipelines
- Intermodal and Third-Party Services

Electronic Commerce
Developments and Requirements

- Directories and Data Bases
- Codes and Classification Systems
- Message Formats
- Interface Technology
- Payment and Credit Services
- International Trade Documentation

Impact on the Transport and
Shipper Communities

Financing the Electronic Commerce
Infrastructure

Conclusions and Recommendations

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About INPUT

INPUT provides planning information, analysis, and recommendations for the information technology industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Subscription services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services. INPUT specializes in the software and services industry which includes software products, systems operations, processing services, network services, systems integration, professional services, turnkey systems, and customer services. Particular areas of expertise include CASE analysis, information systems planning, and outsourcing.

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

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INPUT®

Target the Opportunities in Apparel and Grocery Electronic Commerce

- Identify the fastest growing applications of EDI and other interorganizational systems
- Learn the concerns of users
- Assess the strengths and weaknesses of IS vendors
- Learn of emerging electronic commerce markets
- Discover new service niches such as directories, on-line catalogs, and electronic marketing

Build an interorganizational, electronic infrastructure for trade

Key Benefits

- Develop strategies
- Assess your competition
- Evaluate new technological possibilities
- Re-engineer your organization and industry
- Be more informed for your management and the people you support

Who Needs this Information

- Information systems managers in the grocery, apparel, and retail businesses
- Executives of information systems vendor companies
- Marketing, product, and strategic planning managers at information systems vendor companies
- Directors of trade organizations

The use of interorganizational systems in the food and clothing industries is producing a new kind of commercial phenomenon: electronic commerce.

Two new reports from INPUT assess the information service opportunities of electronic commerce and help vendors and users answer questions such as:

- How do vendors of such systems market them when they require 'buy in' from multiple parties?
- What are the competitive implications when interorganizational systems are owned by a community of users?
- How far can standardization go in synchronizing intercompany processes?
- What further services are needed—such as UPC data bases, product movement/electronic marketing software, etc.—to make the electronic infrastructure more effective?
- When considering technological alternatives, how does one distinguish the *profitable* from the merely *possible*?
- What are profitable implementation strategies when infrastructures are built piecemeal and incrementally?

INPUT has produced two new reports addressing the issues of electronic trade in clothes and food.

Electronic Commerce in Grocery Production and Distribution looks at how communication systems are making the delivery of food less and less expensive.

Electronic Commerce in Apparel Production and Distribution looks at the dynamics of communication technologies in the delivery of apparel.

Specific electronic commerce applications include:

- EDI
- Interactive Voice Response
- Credit and Debit Card Services
- Electronic Marketing and Product Movement Data Services
- Home Shopping
- Electronic Information Services, particularly commodity markets
- Processing Services for Food Brokers

The reports are based on:

- Interviews of IS users in the apparel, grocery, and retail sectors
- Interviews with IS vendors
- Other surveys and data gathered for INPUT's ongoing EDI research program

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Dear Information Systems Professional:

You are truly playing a part in history.

Information systems are bringing unparalleled efficiencies in the production and distribution of consumer merchandise.

Your work, as a provider or implementor of these systems, is making your company's bottom line healthier. It is also bringing lower consumer prices for all of us.

The *electronification* of the apparel and grocery industries continues very rapidly. How will your systems hold up compared to your competitors? What new opportunities are their to serve your customers?

INPUT has produced two new studies of the use of inter-organizational information systems in the apparel and grocery industries. These reports, ***Electronic Commerce in Grocery Production and Distribution*** and ***Electronic Commerce in Apparel Production and Distribution,*** allow you to:

- Assess your competition
- Determine the penetration and use of EDI, transaction-support data bases, and other inter-organizational applications
- Specify the markets for specific information products such as product movement data services and electronic marketing
- Take action to find new technology partners, trading partners, and other strategic relationships

Please review the enclosed brochure for more details. Summaries of the Table of Contents from the two reports is also included. See the order card for a special, money saving offer. Mail, fax, or call your order in today.

Sincerely,

R. Dennis Wayson
Vice President

P.S. These reports are also available as part of INPUT's EDI and Electronic Commerce Program. For more information on these reports or the program, please call Mark Drisko or Paul Kendrick at (415) 961-3300.

Dear Colleague:

We are pleased to announce the

INPUT ANNUAL CONFERENCE SCHEDULE 1992

FEDERAL INFORMATION SYSTEMS AND SERVICES PROGRAM CONFERENCE

Tysons Corner Marriott, Vienna, Virginia June 11 and 12, 1992

Understand the forces behind continued federal market growth. Explore likely legislative, program, regulatory, and funding trends among the major agencies. INPUT's federal conference presents the views and plans of leading agency and contractor executives, including presentations on:

- The overall federal forecast
- Major competitive initiatives and their driving forces
- Major federal policy trends and their likely impacts on upcoming initiatives
- Vendor views on approaching the federal market from various perspectives

Conference fees for INPUT clients: No charge for the first two attendees for subscribers to the Federal Information Systems and Services Program; $295 for each additional attendee or subscribers to other INPUT programs.
Conference fees for non-clients: $795; $545 for each additional attendee.

SYSTEMS INTEGRATION PROGRAM CONFERENCE

Fairview Park Marriott, Falls Church, Virginia July 21 and 22, 1992

Evaluate key technological, economic, industrial, and personnel trends driving the commercial SI market. Users and vendors, along with INPUT experts, present unique perspectives on the market as a whole, as well as on various market niches. The 1992 conference will focus on:

- The overall commercial SI market
- The roles and effects of downsizing and outsourcing in SI
- Opportunities in networking SI
- Leading vertical markets for SI opportunities

Conference fees for INPUT clients: No charge for the first two attendees for subscribers to the Systems Integration Program; $295 for each additional attendee or subscribers to other INPUT programs.
Conference fees for non-clients: $795; $545 for each additional attendee.

continued...

OUTSOURCING INFORMATION SYSTEMS PROGRAM CONFERENCE

(formerly Systems Operations Program)

Ritz-Carlton Hotel, McLean, Virginia September 17 and 18, 1992

Monitor the pulse of outsourcing market changes. Both vendors and users have the opportunity to look at what services are really being outsourced and why. Key issues include:

- Are desktop services the answer to a client's LAN management nightmare—or a vendor's strategy to jump on the downsizing express?
- Are clients really turning over applications development to vendors?
- Is network management being outsourced more frequently?
- Why are organizations outsourcing accounting and customer services operations?
- How can the vendor and client better manage the outsourcing agreement?

Conference fees for INPUT clients: No charge for the first two attendees for subscribers to the Outsourcing Information Systems Program; $295 for each additional attendee or subscribers to other INPUT programs.
Conference fees for non-clients: $795; $545 for each additional attendee.

1992 U.S. EXECUTIVE CONFERENCE

Fairmont Hotel, San Francisco, California October 4, 5, and 6, 1992

Gain a thorough understanding of the major trends within the information services industry—economic, technological, and structural. Evaluate the impacts on the market, its projected growth, leading vendors, and future directions. This conference focuses in particular on the downsizing revolution and its impacts on the industry. Key topics include:

- The information services industry forecast
- Downsizing implications on information systems and vendors
- Strategies for turning downsizing into an opportunity
- Workshops on each of the 8 market segments: processing services; turnkey systems; applications software products; systems operations; systems integration; professional services; network services; and systems software products

Conference fees for INPUT clients: No charge for the first two attendees for subscribers to the Market Analysis, Vendor Analysis, EDI/Electronic Commerce, and Downsizing Information Systems Programs; $295 for each additional attendee or subscribers to other INPUT programs.
Conference fees for non-clients: $895; $545 for each additional attendee.

Join the leading experts and INPUT senior consultants to get first-hand information on what's happening in these various industries. And don't miss a unique opportunity to network with your peers.

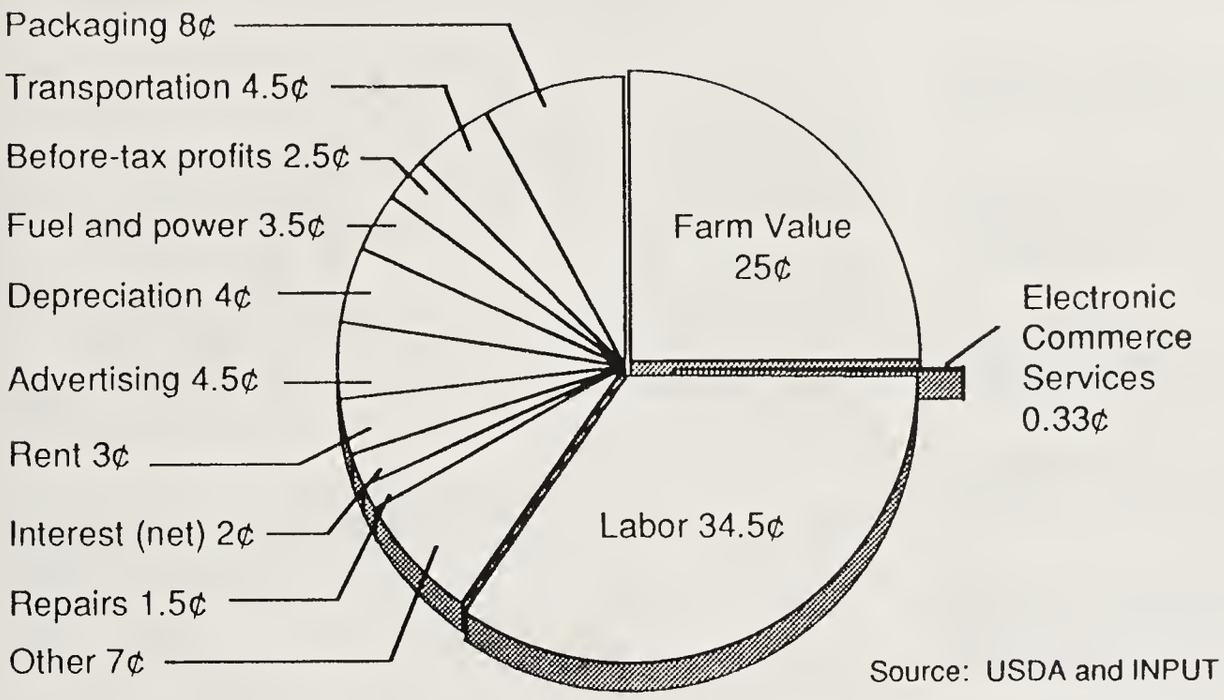
Register today! To register for any of these conferences, or for more information, call Barbara Fisher, Conference Coordinator, at (703) 847-6870. If you are not a client, take advantage of an early registration discount of 10% by registering 30 days prior to the event.

Sincerely,

Barbara A. Fisher
Conference Coordinator

P.S. Should you decide you are unable to attend these events, we trust that you will pass this information on to the appropriate individual(s) in your company.

The Components of a Food Dollar



Source: USDA and INPUT

- Other INPUT reports and research
- INPUT's massive library of company literature, news clippings, periodicals, on-line and CD ROM data bases, and other materials

Each report contains:

- Market sizings on how much users are spending on specific electronic commerce services and software
- Profiles of vendor companies
- Profiles of user applications
- An index of all companies mentioned in the report
- A list of opportunities and impacts

- Recommendations for IS users
- Recommendations for IS vendors

The reports give you:

- Usage levels of several inter-organizational applications
- Details on how companies in grocery and apparel are using interorganizational systems to improve their competitive-ness
- A perspective on the role interorganizational systems have in the evolution of the grocery and apparel industries
- Background on the providers of these systems and services

Become aware of your opportunities. Don't miss the targets in electronic commerce for apparel and grocery. Use the enclosed order card, or call INPUT direct, for fast delivery of this vital information.

Call, fax, or mail your order to your nearest INPUT office

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

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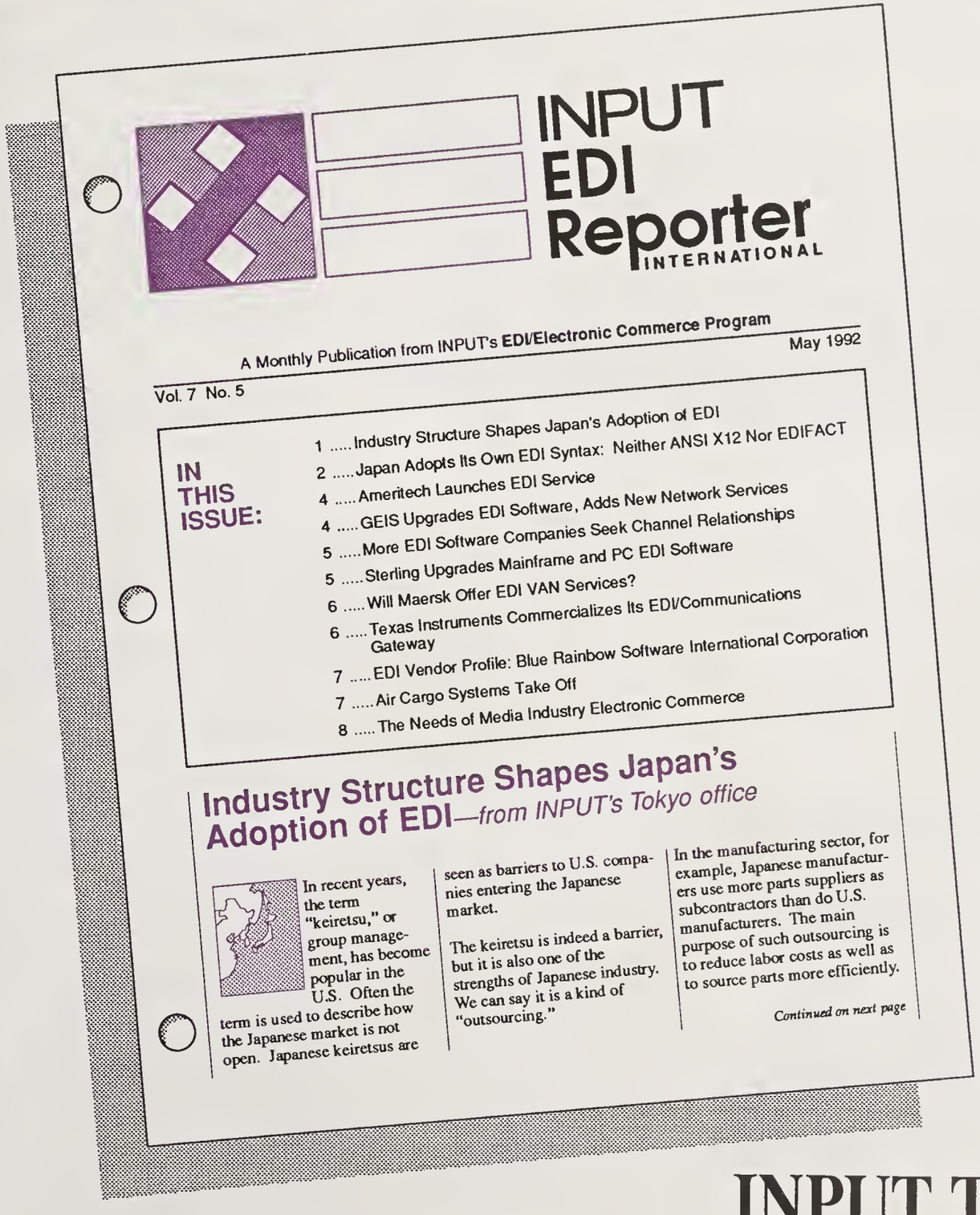
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Electronic Commerce Is Changing the Way The World Does Business...



INPUT
EDI
Reporter
INTERNATIONAL

A Monthly Publication from INPUT's **EDI/Electronic Commerce Program**

May 1992

Vol. 7 No. 5

IN THIS ISSUE:

1 Industry Structure Shapes Japan's Adoption of EDI
2 Japan Adopts Its Own EDI Syntax: Neither ANSI X12 Nor EDIFACT
4 Ameritech Launches EDI Service
4 GEIS Upgrades EDI Software, Adds New Network Services
5 More EDI Software Companies Seek Channel Relationships
5 Sterling Upgrades Mainframe and PC EDI Software
6 Will Maersk Offer EDI VAN Services?
6 Texas Instruments Commercializes Its EDI/Communications Gateway
7 EDI Vendor Profile: Blue Rainbow Software International Corporation
7 Air Cargo Systems Take Off
8 The Needs of Media Industry Electronic Commerce

Industry Structure Shapes Japan's Adoption of EDI—*from INPUT's Tokyo office*

In recent years, the term "keiretsu," or group management, has become popular in the U.S. Often the term is used to describe how the Japanese market is not open. Japanese keiretsus are seen as barriers to U.S. companies entering the Japanese market.

The keiretsu is indeed a barrier, but it is also one of the strengths of Japanese industry. We can say it is a kind of "outsourcing."

In the manufacturing sector, for example, Japanese manufacturers use more parts suppliers as subcontractors than do U.S. manufacturers. The main purpose of such outsourcing is to reduce labor costs as well as to source parts more efficiently.

Continued on next page

...INPUT Tells You How

How Is Electronic Commerce Changing *Your* Business? (or your competitors'?)

Let INPUT Fill You In

EDI Reporter, a monthly newsletter published by INPUT, is the only newsletter that illuminates this wholly new phenomenon of business.

Not a technical publication, *EDI Reporter* first and foremost answers the question, "When, where, and how does electronic commerce make sense from a business perspective?"



For Users

The EDI Reporter answers questions like the following:

- Where do EDI and electronic commerce fit in your business?
- Will EDI use provide significant competitive edge?
- How expensive will EDI implementation be?
- Who provides the best products and services?

For Vendors

The *EDI Reporter* answers:

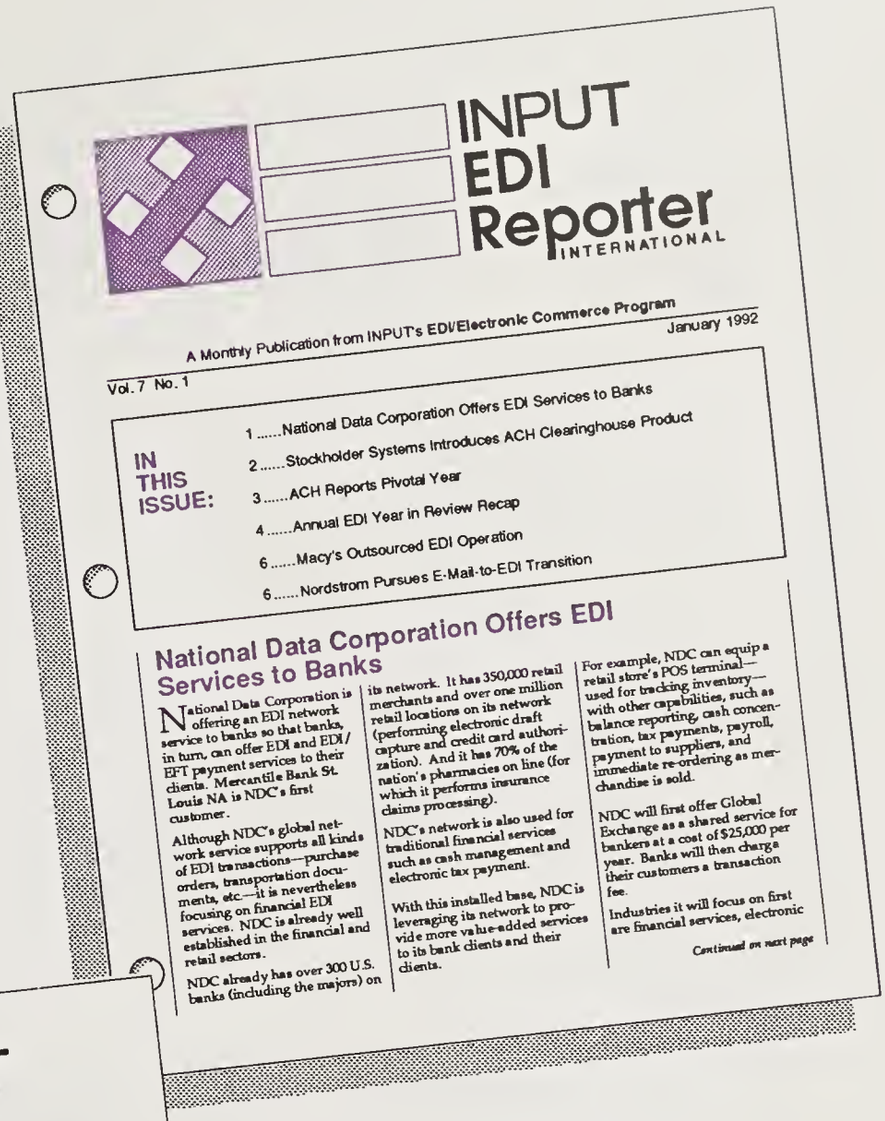
- What are the most effective solutions you can offer potential users?
- Who is providing these solutions?
- What experiences, good and bad, have users had?
- What's happening with your competitors?

The *EDI Reporter*— Your Hotline to Electronic Commerce

Whether you are a user or a vendor of electronic commerce and EDI—and increasingly these days, you are both—*EDI Reporter* presents in an easy-to-read, 12-page format the latest issues in this dynamic market:

- **Case Studies** of EDI implementations based on personal interviews
- **Company Profiles** of EDI product and service vendors
- **Product Profiles** of new EDI products
- **Key Contacts**— identification of the major players in the EDI user and vendor community
- **Analysis of Competitive Issues**, such as standards, that affect EDI implementation worldwide
- **Empirical Market Data** based on INPUT's ongoing user surveys
- **Graphic Exhibits** of business models, EDI communi-cations links, etc., that clearly illustrate benefits of EDI implementation
- **Upcoming Calendar** of international EDI conferences and events

- Company Profiles
- Identification of Key Contacts



INPUT
EDI
Reporter
INTERNATIONAL

A Monthly Publication from INPUT's EDI/Electronic Commerce Program

January 1992

Vol. 7 No. 1

IN THIS ISSUE:

1 National Data Corporation Offers EDI Services to Banks
2 Stockholder Systems Introduces ACH Clearinghouse Product
3 ACH Reports Pivotal Year
4 Annual EDI Year in Review Recap
6 Macy's Outsourced EDI Operation
6 Nordstrom Pursues E-Mail-to-EDI Transition

National Data Corporation Offers EDI Services to Banks

National Data Corporation is offering an EDI network service to banks so that banks, in turn, can offer EDI and EDI/EFT payment services to their clients. Mercantile Bank St. Louis NA is NDC's first customer.

Although NDC's global network service supports all kinds of EDI transactions—purchase orders, transportation documents, etc.—it is nevertheless focusing on financial EDI services. NDC is already well established in the financial and retail sectors.

NDC already has over 300 U.S. banks (including the majors) on its network. It has 350,000 retail merchants and over one million retail locations on its network (performing electronic draft capture and credit card authorization). And it has 70% of the nation's pharmacies on line (for which it performs insurance claims processing).

NDC's network is also used for traditional financial services such as cash management and electronic tax payment.

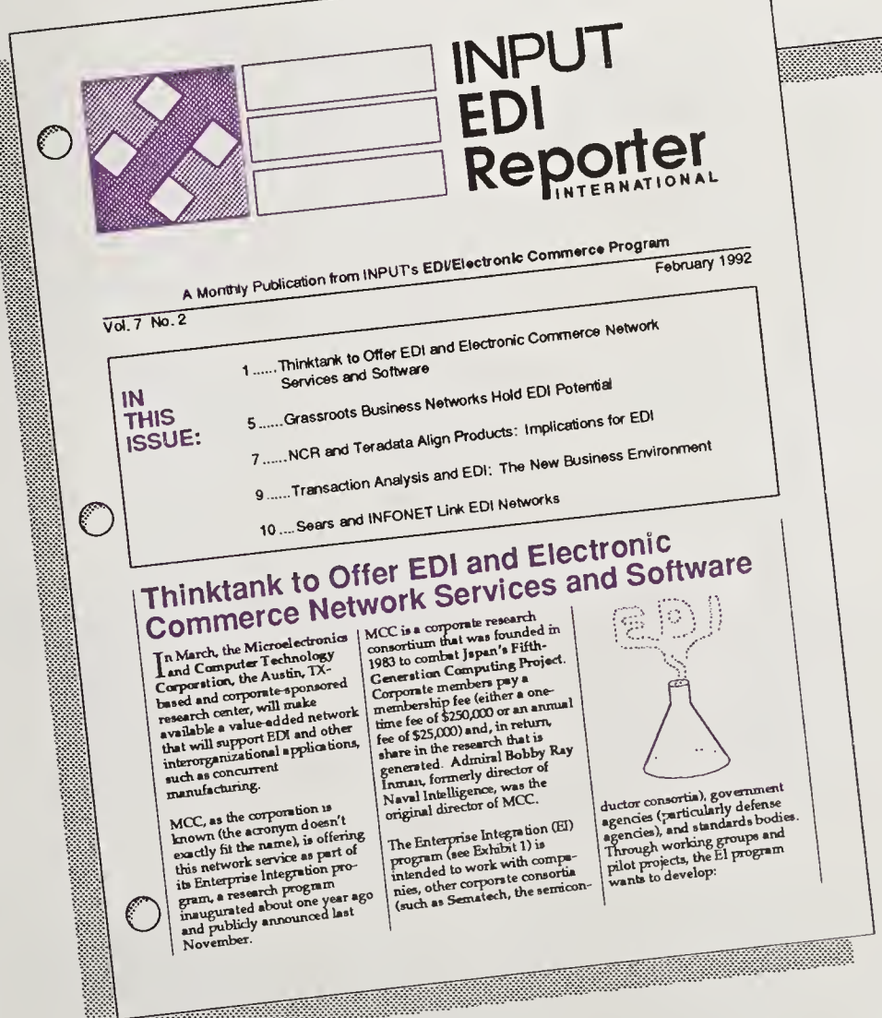
With this installed base, NDC is leveraging its network to provide more value-added services to its bank clients and their clients.

For example, NDC can equip a retail store's POS terminal—used for tracking inventory—with other capabilities, such as balance reporting, cash concentration, tax payments, payroll, immediate re-ordering as merchandise is sold.

NDC will first offer Global Exchange as a shared service for bankers at a cost of $25,000 per year. Banks will then charge their customers a transaction fee.

Industries it will focus on first are financial services, electronic

Continued on next page



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A Monthly Publication from INPUT's EDI/Electronic Commerce Program

February 1992

Vol. 7 No. 2

IN THIS ISSUE:

1 Thinktank to Offer EDI and Electronic Commerce Network Services and Software
5 Grassroots Business Networks Hold EDI Potential
7 NCR and Teradata Align Products: Implications for EDI
9 Transaction Analysis and EDI: The New Business Environment
10 Sears and INFONET Link EDI Networks

Thinktank to Offer EDI and Electronic Commerce Network Services and Software

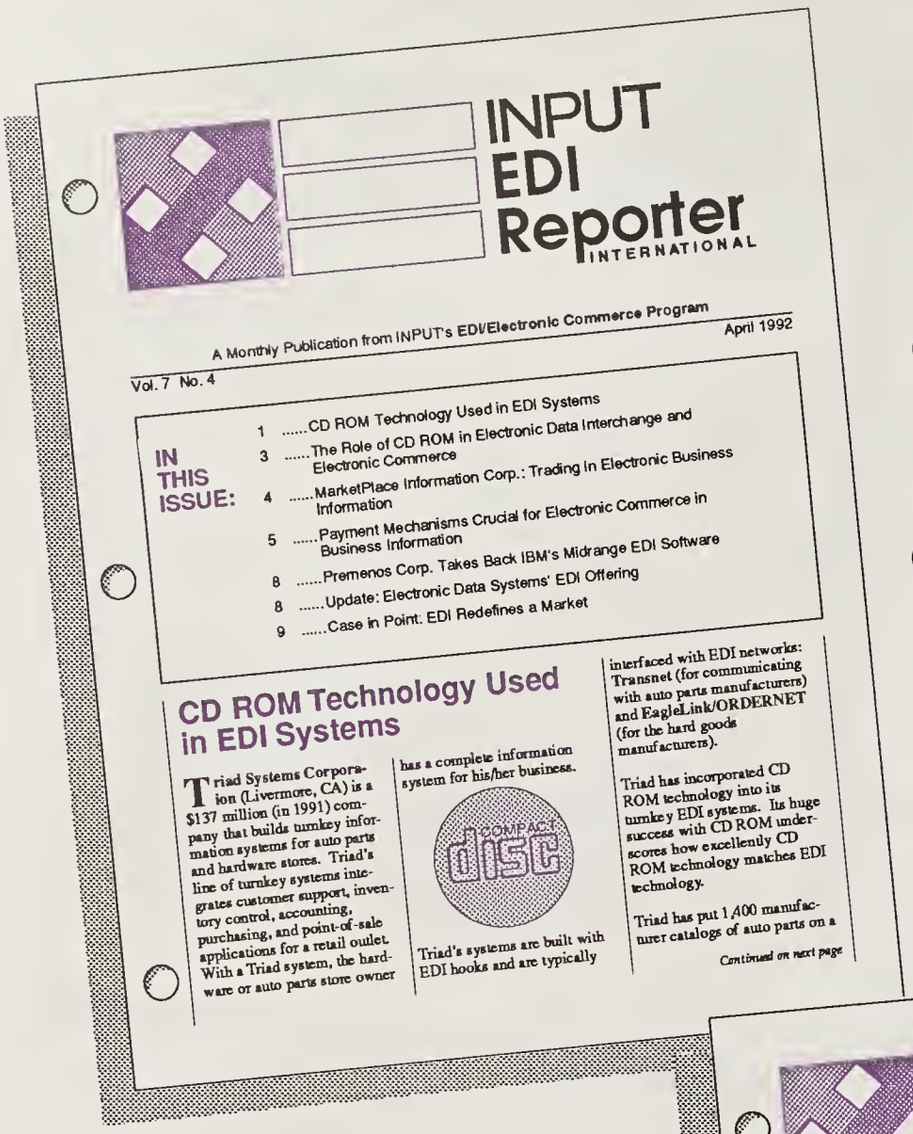
In March, the Microelectronics and Computer Technology Corporation, the Austin, TX-based and corporate-sponsored research center, will make available a value-added network that will support EDI and other interorganizational applications, such as concurrent manufacturing.

MCC, as the corporation is known (the acronym doesn't exactly fit the name), is offering this network service as part of its Enterprise Integration program, a research program inaugurated about one year ago and publicly announced last November.

MCC is a corporate research consortium that was founded in 1983 to combat Japan's Fifth-Generation Computing Project. Corporate members pay a membership fee (either a one-time fee of $250,000 or an annual fee of $25,000) and, in return, share in the research that is generated. Admiral Bobby Ray Inman, formerly director of Naval Intelligence, was the original director of MCC.

The Enterprise Integration (EI) program (see Exhibit 1) is intended to work with companies, other corporate consortia (such as Sematech, the semiconductor consortia), government agencies (particularly defense agencies), and standards bodies. Through working groups and pilot projects, the EI program wants to develop:

- Graphical Exhibits
- Upcoming Industry Events



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A Monthly Publication from INPUT's EDI/Electronic Commerce Program

April 1992

Vol. 7 No. 4

IN THIS ISSUE:

1 CD ROM Technology Used in EDI Systems
3 The Role of CD ROM in Electronic Data Interchange and Electronic Commerce
4 MarketPlace Information Corp.: Trading In Electronic Business Information
5 Payment Mechanisms Crucial for Electronic Commerce in Business Information
8 Premenos Corp. Takes Back IBM's Midrange EDI Software
8 Update: Electronic Data Systems' EDI Offering
9 Case in Point: EDI Redefines a Market

CD ROM Technology Used in EDI Systems

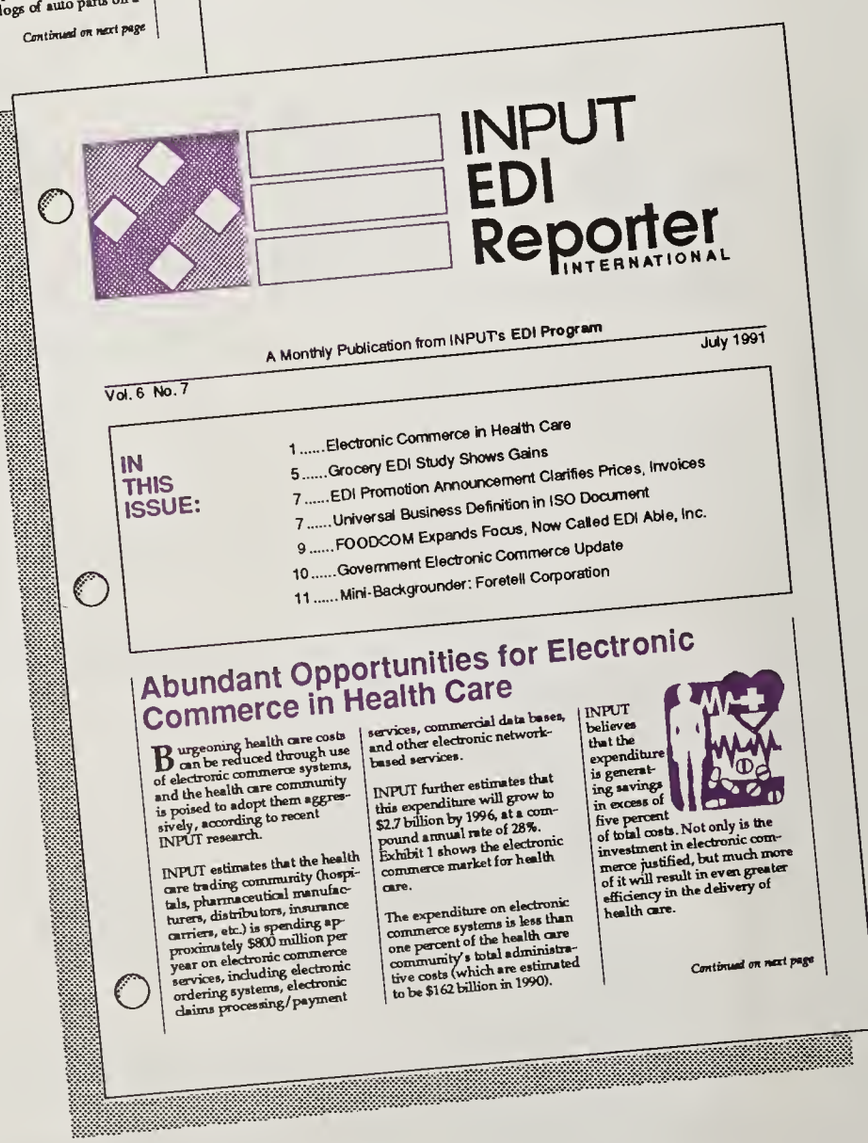
Triad Systems Corporation (Livermore, CA) is a $137 million (in 1991) company that builds turnkey information systems for auto parts and hardware stores. Triad's line of turnkey systems integrates customer support, inventory control, accounting, purchasing, and point-of-sale applications for a retail outlet. With a Triad system, the hardware or auto parts store owner has a complete information system for his/her business.

Triad's systems are built with EDI hooks and are typically interfaced with EDI networks: Transnet (for communicating with auto parts manufacturers) and EagleLink/ORDERNET (for the hard goods manufacturers).

Triad has incorporated CD ROM technology into its turnkey EDI systems. Its huge success with CD ROM underscores how excellently CD ROM technology matches EDI technology.

Triad has put 1,400 manufacturer catalogs of auto parts on a

Continued on next page



INPUT
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A Monthly Publication from INPUT's EDI Program

July 1991

Vol. 6 No. 7

IN THIS ISSUE:

1 Electronic Commerce in Health Care
5 Grocery EDI Study Shows Gains
7 EDI Promotion Announcement Clarifies Prices, Invoices
7 Universal Business Definition in ISO Document
9 FOODCOM Expands Focus, Now Called EDI Able, Inc.
10 Government Electronic Commerce Update
11 Mini-Backgrounder: Foretell Corporation

Abundant Opportunities for Electronic Commerce in Health Care

Burgeoning health care costs can be reduced through use of electronic commerce systems, and the health care community is poised to adopt them aggressively, according to recent INPUT research.

INPUT estimates that the health care trading community (hospitals, pharmaceutical manufacturers, distributors, insurance carriers, etc.) is spending approximately $800 million per year on electronic commerce services, including electronic ordering systems, electronic claims processing/payment services, commercial data bases, and other electronic network-based services.

INPUT further estimates that this expenditure will grow to $2.7 billion by 1996, at a compound annual rate of 28%. Exhibit 1 shows the electronic commerce market for health care.

The expenditure on electronic commerce systems is less than one percent of the health care community's total administrative costs (which are estimated to be $162 billion in 1990).

INPUT believes that the expenditure is generating savings in excess of five percent of total costs. Not only is the investment in electronic commerce justified, but much more of it will result in even greater efficiency in the delivery of health care.

Continued on next page

- Case Studies
- Vendor Profiles
- Market Data
- Strategic Issue Analysis

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California Clients: please add applicable sales tax on 70% of the purchase price.

☐ *I'm interested in multiple subscriptions. Please have a representative contact me regarding multiple site fees.*

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☐ *Please send me more information about INPUT's EDI and Electronic Commerce Program.*

☐ *Please send me more information about INPUT's Custom Consulting capabilities for EDI and Electronic Commerce.*

☐ *Please have a representative call me about how INPUT services can apply specifically to my business.*

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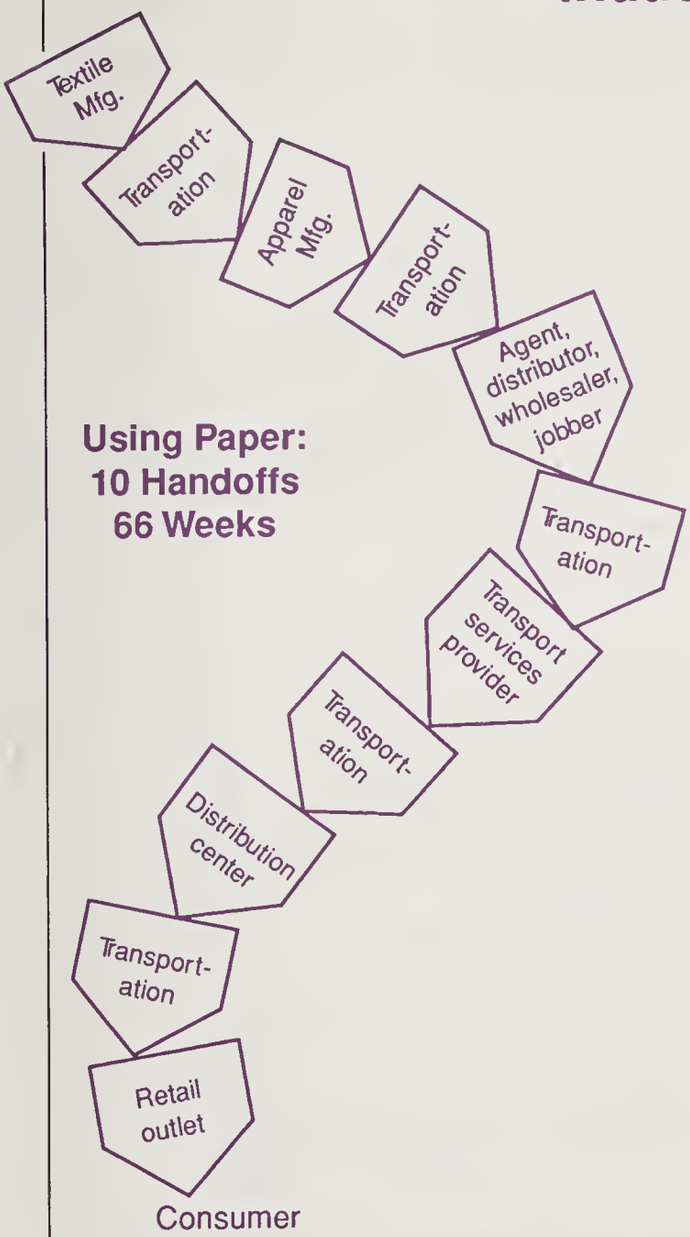
Title _____ City _____

Company _____ State _____ Zip _____

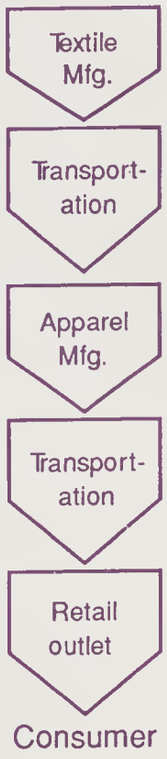
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Paper-Based versus Electronic-Based Industry Structure



Using Paper:
10 Handoffs
66 Weeks



Using Electronics:
4 handoffs
3 weeks

Which Road Is Your Company Traveling?

It takes 66 weeks from the time a piece of cotton is harvested to the time a shirt is purchased by a consumer in a retail store. Ninety-eight percent of the time the product is sitting idle in a queue, warehouse, on a store shelf, etc. Electronic commerce reduces this idle time so that working stock is continually being converted to product in one uninterrupted value-adding series of processes. This exhibit depicts how the value chain of textiles, apparel manufacturers, and retailers could reduce the number of transactions in the value chain by implementing electronic commerce.

Turn Potential into Reality

It's no longer a question of *whether* your business will be affected, but *how* and *when*.

Electronic commerce has tremendous potential to facilitate and transform how business is conducted worldwide.

The *EDI Reporter* will give you this crucial information.

Staying informed is the best way for you to turn potential into reality. Subscribe today!

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About INPUT

INPUT is a worldwide consulting and market research firm uniquely focused on the information technology services and software markets. Executives in many technically advanced companies in North America, Europe, and Japan rely on INPUT for data, objective analysis, and insightful opinions to support their business plans, market assessments, and technology directions. By leveraging INPUT's considerable knowledge and expertise, clients make informed decisions more quickly, and benefit by saving on the cost of internal research.

Since 1974, INPUT has compiled the most extensive research base available on the worldwide information services market and its key segments, providing detailed market forecasts, vertical industry sector analysis and forecasts and analysis of vendor strategies and products. INPUT delivers specific expertise in the fast changing areas of outsourcing, systems integration, EDI/electronic commerce, software development/CASE, and on the impact of downsizing.

Consulting services are provided by more than 50 professionals in major international business centers. Clients retain INPUT for custom consulting/proprietary research, subscription-based continuous advisory programs, merger/acquisition analysis and detailed studies of U.S. federal government IT procurements.

Most clients have retained INPUT continuously for a number of years, providing testimony to INPUT's consistent delivery of high-value solutions to complex business problems. To find out how your company can leverage INPUT's market knowledge and experience to gain a competitive edge, call us today.

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Tokyo 101, Japan
Tel. (03) 3864-0531 Fax (03) 3864-4114

1992 INPUT Conference Schedule—U.S.

September 17 & 18 — **Outsourcing Information Systems Conference**
Ritz-Carlton Hotel, McLean, Virginia

October 4, 5, & 6 — **1992 U.S. Executive Conference**
Fairmont Hotel, San Francisco, California

INPUT®

Where are the opportunities in the convergence of computers, consumer electronics, telecommunications and media/publishing?

Find out in INPUT's report:

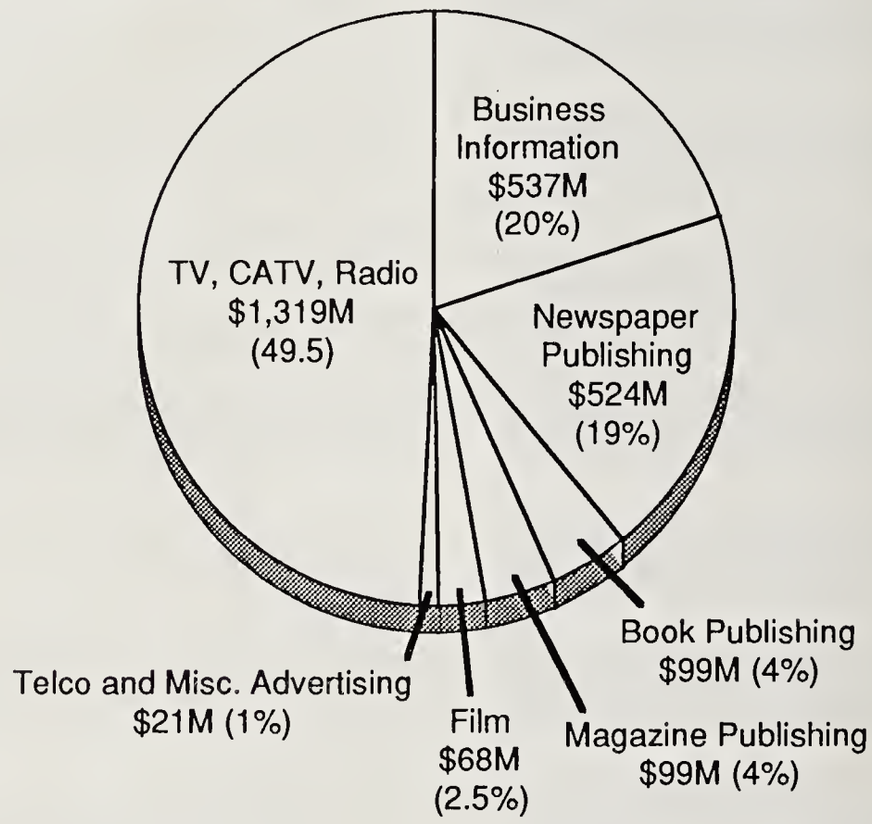
Electronic Commerce in the Media Industry

Identify the needs and market opportunities of the new integrated electronic media

If you are a media company or a company that provides information services to media companies, you need to know...

- How will film companies, print publishers, television companies, telephone companies, advertisers, and business information providers combine and/or compete to make powerful market offerings?
- Which electronic information technologies will work the best to support these new offerings?
- Who will win the market for consumer information delivery: cable operators, phone companies, newspaper or magazine publishers?
- How will the book publishing market shake out among traditionally produced, on-demand and electronically-delivered texts?
- How can EDI be used in conjunction with the delivery of electronic media products?

Spending by Media Companies on Trade Facilitation Software and Services



Total spending: $2,667 Million

Source: INPUT

This study is NOT...

...the typical analyst opinion based on which way the wind is blowing. Opinions based on casual market observation only confuse everyone—and it isn't INPUT's style.

This study IS ...

...an objective, unbiased view of how an electronic information infrastructure is re-making the way businesses operate. It is a comprehensive assessment based on quantitative market/financial numbers, user and vendor surveys, and the expertise of INPUT.

Identify the tremendous opportunities...

The media industry is rapidly changing. Windows of opportunity are opening and closing. Whether you are a media provider or user, or provide systems to media companies, you need an informed perspective on the tremendous changes that are occurring.

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Dear Colleague:

Today's advanced technology is forcing a convergence in the media industry. Telephone, television, radio, publishing and advertising are no longer separate and distinct media segments. Consequently, a new market of overlapping products is emerging and reshaping the industry.

What are the opportunities? Who are the major players? What are the new customer needs? Where are the opportunities for new products?

INPUT, a worldwide consulting and market research firm, has just completed a new report, *Electronic Commerce in the Media Industry*. This study gives you a guide to surviving the great reshaping of the media industry, including:

- **Media Industry** — Who are the key players? Where will electronic network based systems bring new value to customers?
- **Electronic Technologies** — What are media industry segments doing with the new technologies?
- **Electronic Commerce Systems** — How will these systems grow and evolve? Where are the opportunities for new business?

Capitalize on the experience of companies that are changing the contours of how media is delivered and used. Order INPUT's *Electronic Commerce in the Media Industry* and you will gain valuable insights and learn of new opportunities to help your business grow.

Sincerely,

Torrey Byles
Program Manager

PS. This report is also available as part of INPUT's EDI and Electronic Commerce Program. For more information on this report or the program, please call me directly at (415) 961-3300.

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About INPUT's report, Electronic Commerce in the Media Industry...

Please send me the report for $995 ($1,295 after September 25, 1992)— California Clients: Please add applicable sales tax on 70% of the purchase price.

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About related reports...

Please keep me informed of future studies on Electronic Commerce and...

- ☐ Trade and Transportation ☐ Health Care ☐ Finance and Insurance
- ☐ Travel and Tourism ☐ U.S. Federal Government ☐ Grocery ☐ Apparel

INPUT's EDI and Electronic Commerce Program — keeps executives in touch with this fast-changing environment year-round by providing market forecasts, analysis of vertical markets and insightful opinions on trends and major issues shaping the industry. For more information on this program, check below and indicate your specific interest areas.

- ☐ *Yes! Send me information on the EDI and Electronic Commerce Program. I'm specifically interested in the topics listed below:*

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The Benefits of This Report

In one well-organized report you have a guide to surviving the great reshaping of the media industry. This report will help you plan your business strategy: what the market directions are, which markets for electronic network solutions exist, who the players are, and what specific activities are taking place in specific segments — publishing, television, business information, etc.

Vendor Benefits

- Know the complete value chain in which you operate and how that value chain is liable to be re-engineered and re-structured due to electronic communication technologies.
- Understand what the hot processing/network service needs are in the media industry, including invoice processing in the advertising industry, billing services for cable television, royalty/billing services in the print media, and electronic trading of intellectual properties.
- Map out the media industry, including the key players, their trading volumes, and where electronic network-based systems will bring new value to customers.

Buyer Benefits

- Learn how to leverage your existing products and services and create new media products and services.
- Learn what other media industry segments are doing with electronic technologies.
- See how your information and expertise can be turned into a media-delivered offering.
- Become a market maker in your media segment.

Capitalize on the experience of companies that are changing the contours of how media is delivered and used.

Order INPUT's latest report, Electronic Commerce in the Media Industry.

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EDI

What are the opportunities?

Who are the players,?

What are users saying?

Find out in INPUT's reports

The U.S. Electronic Data Interchange Market, 1992-1997

EDI Vendor Profiles and Competitive Assessment

What's wrong with EDI? Where's the payback; where's the market? How can you break through the EDI logjam?

The U.S. Electronic Data Interchange Market, 1992 - 1997

Key questions answered in this report:

- What are EDI users saying about the difficulty of integrating EDI with internal applications?
- What are the benefits of using a client/server architecture for your EDI application?
- To what extent are companies using real-time EDI and electronic payment services?
- How are other alternative communication channels such as voice response and facsimile impacting EDI implementation and architectures?
- What are the current EDI standards issues?
- How must the store-and-forward architecture of current EDI change to accommodate real time? What industries want real time? Why do they want it?
- Where is the market going for UNIX-based, client/server EDI software?

Vendor Benefits

- **Listen to your marketplace:** Discover the buying patterns of EDI users (such as the factors that lead a user to upgrade its EDI software).
- **Identify industries** with specific EDI needs (for example, those that need real time or EDI/EFT).
- **Compare your company** revenues and market share figures with your competitors.
- **Learn the trends** in new EDI product features (mappers, development platforms, program interfaces with other network applications, UNIX, etc.).

Buyer Benefits

- **Put together EDI strategies and implementation plans** for EDI applications and trading partners.
- **Learn how other companies and other industries are successfully using EDI,** what their problems have been, what internal applications are integrated with EDI, what kinds of hardware/devices are used, etc.
- **Identify the leading edge EDI software and service providers.**
- **Develop competitive advantages of using EDI.**

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INPUT provides clients with the intelligence needed to discover the buying patterns of EDI users and to put together an EDI implementation plan.

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Assess EDI Vendors, Products, & Services

- Know what users are asking for.
- Examine in detail the strengths, weaknesses, offerings, and strategies of EDI software and service providers.
- Rank vendors according to strengths, market share, and alliances.
- Assess the competitive environment

EDI Vendor Profiles and Competitive Assessment

This report presents the entire universe of EDI—descriptions of EDI products and services and background on the companies that produce them. It includes an INPUT assessment of the companies which identifies their strengths and weaknesses, and compares them by market share, prices, and breadth of offering.

In addition to the 38 vendors who have been specifically profiled, INPUT lists 240 individual vendors with relationships to the EDI marketplace. Vendors are assessed according to delivery mode including providers of EDI software, EDI/EFT software, turnkey systems, network services, telephone company services, industry clearinghouse functions, bank EDI/EFT processing, systems vendors for public networks, systems vendors for private networks, application software, and large EDI users.

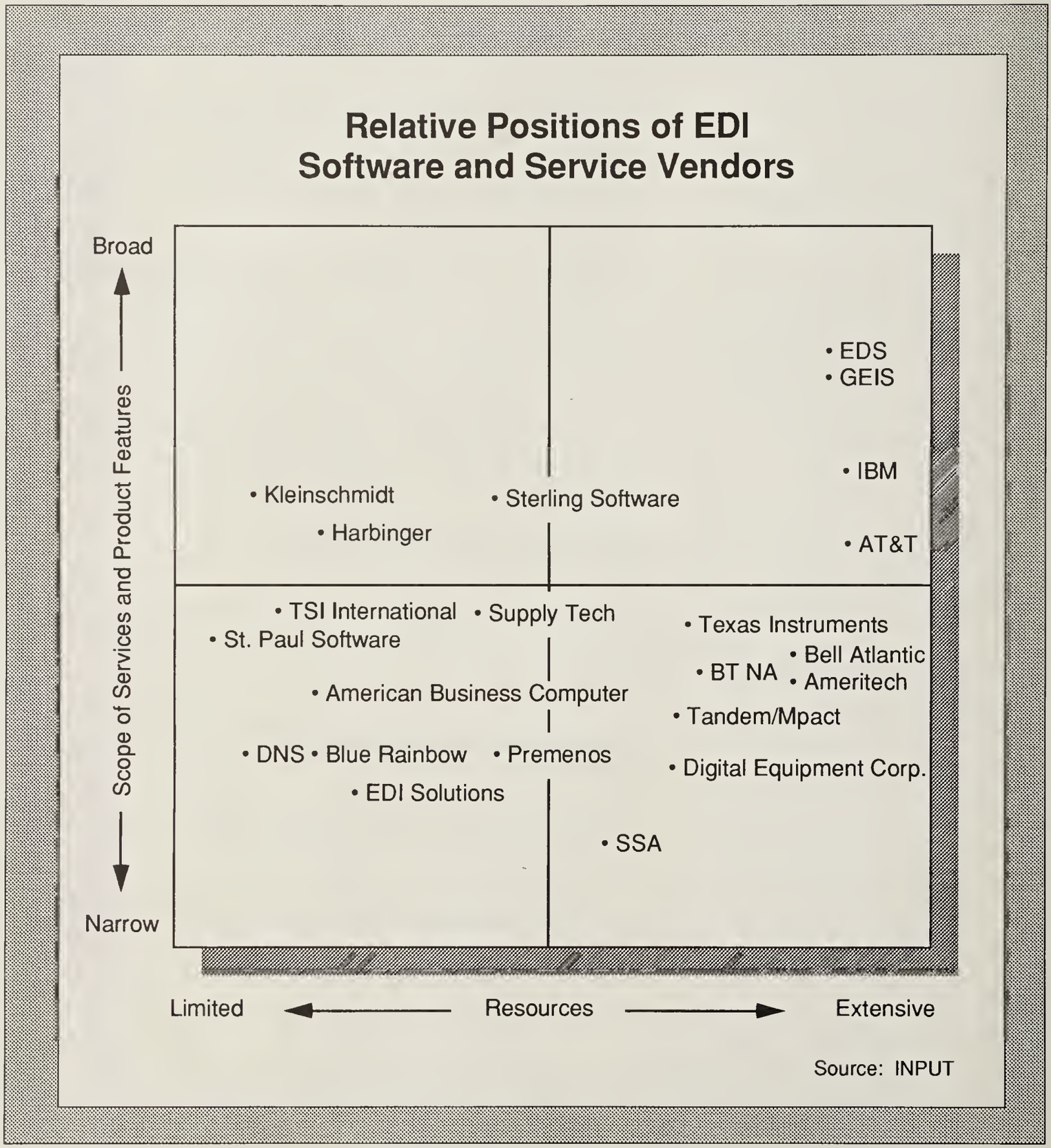
Vendor Benefits

- Assess your competitors' prices, offerings, market share, competitive standing.
- Identify new product development opportunities.

Buyer Benefits

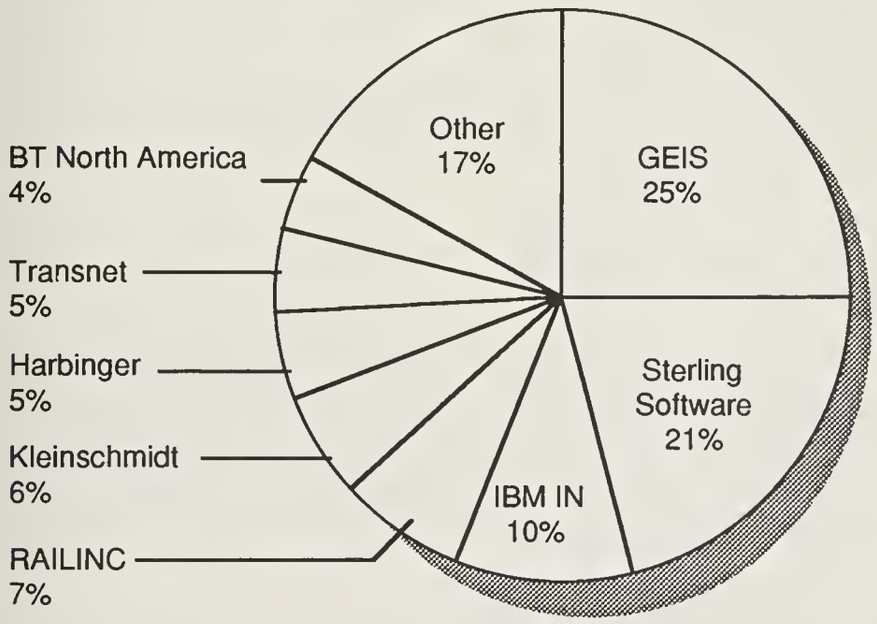
- Comparison shop and assess the strengths and weaknesses of EDI software and service vendors.
- Assess the breadth of offering of EDI vendors. Are they full-solution providers or merely technology vendors?

Distinguish between the solution providers and the technical vendors



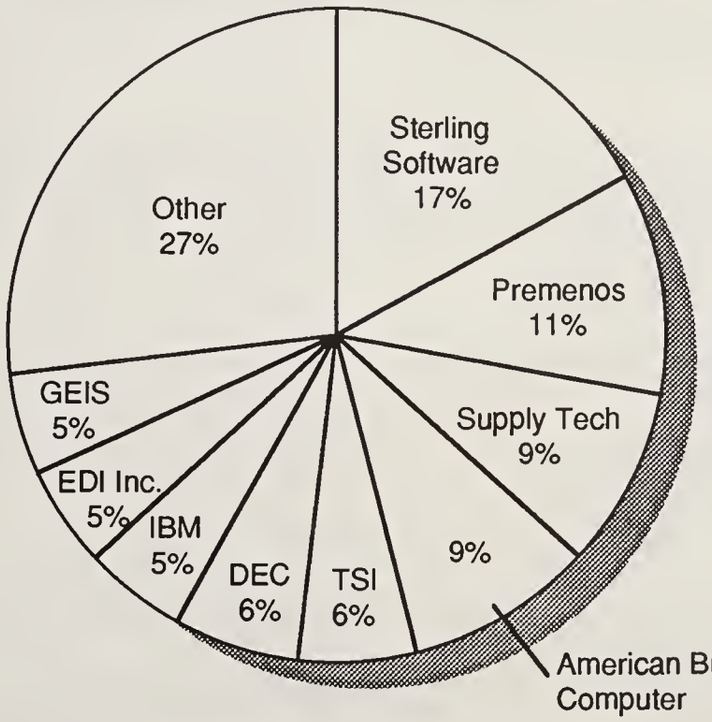
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1992 Market Share—Leading EDI VANs



Total Market = $186 million

1992 Market Share
Leading EDI Software Vendors



Source:
INPUT

Total Market = $102 million

- Assess the extent to which users are capturing EDI benefits
- Examine what industries are the most EDI active and industries with opportunities
- Understand how electronic payments, real time, and UNIX are affecting the evolution of EDI architectures

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INPUT's EDI & Electronic Commerce Program

Examines the marketing, competitive, and economic issues of the movemen from paper to electronic-based commerce.

- Electronic Data Interchange
- Point-of-Sale Data Applications
- Interactive Voice Response and Facsimile Systems
- Reservation Systems
- Buy/Sell Electronic Bulletin Boards
- Electronic Trade Payments
- Electronic Information Services for Commercial Transactions
- Automatic Identification Technologies
- Automated Trading Systems
- Electronic Mail Used for Trade

Custom Consulting

INPUT conducts over 100 primary research studies for clients every year, many focused on downsizing topics. These have included analysis of product introductions, marketing strategies, competitive analysis, and vendor merger/acquisition study. For users, INPUT has evaluated specific applications, costs of downsizing, vendor evaluation, and the potential for outsourcing.

About INPUT

INPUT is a worldwide consulting and market research firm uniquely focused on the information technology services and software markets. Executives in many technically advanced companies in North America, Europe, and Japan rely on INPUT for data, objective analysis, and insightful opinions to support their business plans, market assessments, and technology directions. By leveraging INPUT's considerable knowledge and expertise, clients make informed decisions more quickly, and benefit by saving on the cost of internal research.

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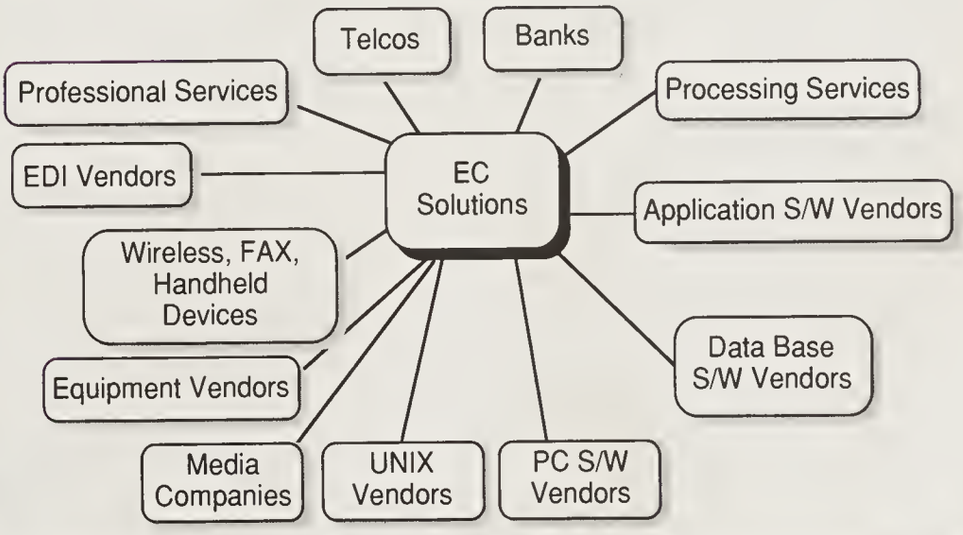
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What Are the New Opportunities in Using Electronic Systems To Conduct Trade?

Find out in INPUT's new report ...

Electronic Commerce: Comprehensive Market Assessment

Electronic Commerce Enablers



- **Protect yourself from new competitors or shrinking customer bases.**
- **Compare and contrast the merits of EDI, point-of-sale, electronic payments, enhanced facsimile, electronic information services, and many other kinds of specific electronic commerce delivery modes.**
- **Discover through case studies what companies in retail, manufacturing, distribution, transportation, banking and finance, media, and government are doing with electronic commerce systems to give them superior competitive positions.**

INPUT examines in detail the trade flows of s

Grocery Trading Community
(Billi

Electronic commerce is the use of electronic information/ network systems for the transmission and recording of the many kinds of communications in a commercial transaction.

Electronic commerce is a reality and a huge opportunity. This report documents and shows how companies are taking advantage of this opportunity.

See how reservation systems have impacted the airline industry.

See what EDI is doing to many of the transportation carrier and service companies.

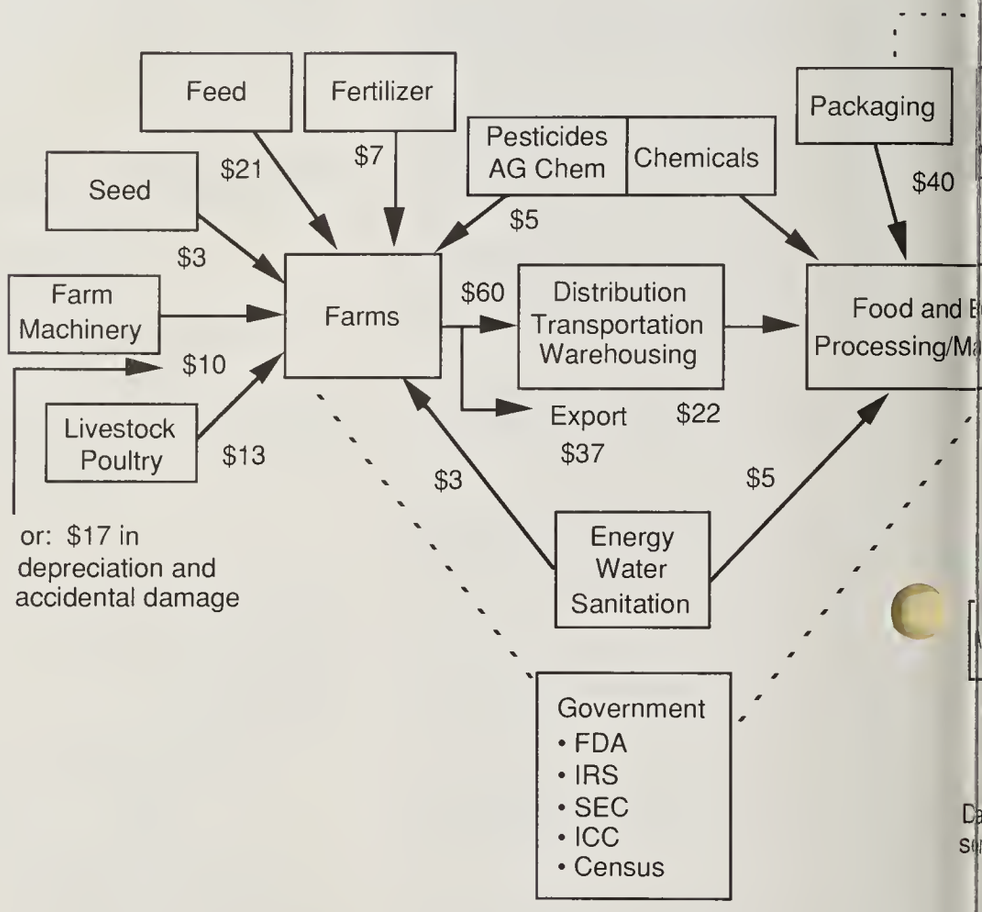
See what a tremendous opportunity point-of-sale applications represent in the value chains that involve consumers.

See how electronic commerce systems tightly link production value chains with consumer purchases, and in the process eliminate the dislocations of uncoordinated inventories.

What are the prospects for electronic commerce growth in the 1990s?

Why are modular, standardized components (EDI, UNIX, microcomputers) better than mainframe-based proprietary systems?

Who and what companies are doing the best job in taking advantage of the electronic commerce wave of opportunity?



Where are the opportunities for electronic
Find out in INPUT's *Electronic Commerce*

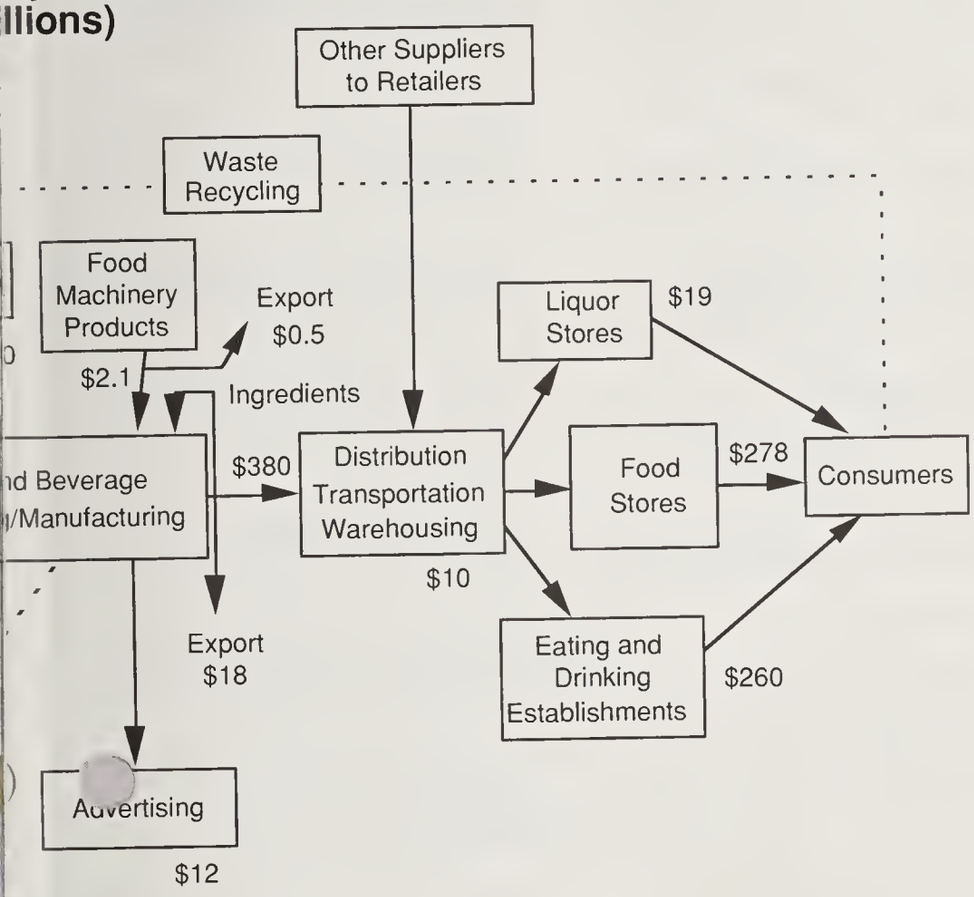
The Benefits of This Report

In one, well organized report, you are given the complete world of electronic commerce: the applications, the best examples, the competitive advantages and disadvantages, the companies today that are selling electronic commerce solutions, how electronic commerce is impacting specific industries.

In addition to its definitive and comprehensive overview of what electronic commerce is, the report is loaded with quantitative data that shows the specific opportunities of electronic commerce. For example, how much money is being spent today on point-of-sale applications, or electronic information services (such as directories or product catalogs), or on processing services.

several select trading communities

ity: Players and Trade Flows
llions)



Dollar numbers represent value of shipments from seller to buyer as indicated by arrow direction.

Source: INPUT

nic commerce systems in this value chain?
rce: Comprehensive Market Assessment.

Vendor Benefits

Software, service, and IT equipment vendors can use the report to develop a general strategic definition of electronic commerce and its implications for them. These kinds of companies include EDI providers, professional service firms, banks, telephone companies, processing service vendors; application software vendors, PC software vendors; data base vendors, UNIX vendors; cellular, wireless, facsimile, and handheld equipment vendors; and publishers.

Buyer Benefits

Companies using electronic systems to enhance communications with their customers and suppliers will find the report useful for its outlining of the issues of electronic commerce, a listing of the specific technologies and how they are being used today, and a profiling of the principal IS vendors that provide electronic commerce technologies and solutions.

Use this report to chart your company's strategy in adopting electronic commerce systems. Benchmark and compare your company's performance to that of leading users of electronic commerce.

Identify the competitive threats of using electronic commerce systems: other companies, your trading partners. Identify companies that are suited to partner with you in implementing your EC strategy. See who the leaders are in electronic commerce.

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to your nearest
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About INPUT

Since 1974, information technology (IT) users and vendors throughout the world have relied on INPUT for data, objective analysis, and insightful opinions to support their plans, market assessments and technology directions particularly in computer software and services. Clients make informed decisions more quickly and save on the cost of internal research by using INPUT's services.

Call us today to learn how your company can use INPUT's knowledge and experience to grow and profit in the revolutionary IT world of the 1990s.

Annual Subscription Programs

North American and European Market Analysis Programs

Analysis of Information Services, Software, and Systems Maintenance Markets
5-year Forecasts, Competitive and Trend Analysis

- 9 Categories of Software and Services
- 15 Vertical Markets
- 7 Cross-Industry Markets
- The Worldwide Market (30 countries)

U.S. Focused Programs

- Outsourcing (vendor and user)
- Downsizing (vendor and user)
- Systems Integration
- EDI and Electronic Commerce
- IT Vendor Analysis
- U.S. Federal Government IT Procurements

European Focused Programs

- Outsourcing (vendor and user)
- Downsizing (vendor and user)
- Systems Integration
- Network Management
- Customer Services

Custom Consulting

Many vendors leverage INPUT's proprietary data and industry knowledge by contracting for custom consulting projects to address questions about their specific market strategies, new product/service ideas, customer satisfaction levels, competitive positions and merger/acquisition options.

INPUT advises users on a variety of IT planning and implementation issues. Clients retain INPUT to assess the effectiveness of outsourcing their IT operations, assist in the vendor selection process and in contract negotiation/ implementation. INPUT has also evaluated users' plans for systems and applications downsizing.

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Electronic Marketplaces in the Travel Industry—

Good or Bad?

- Computer reservation systems, electronic network systems, credit card processing—how are they changing the travel industry?
- What investments are required for an integrated electronic commerce system?
- What are the economics of operating these costly systems?

Electronic Commerce in Travel & Tourism

Is your business positioned to capitalize on this revolutionary *phenomenon*?

If you are in the travel and tourism industry, you need this important research for ...

Electronic Commerce in Travel & Tourism is a one-stop source examining how electronic network systems are used in the travel and tourism industry. Whether you are a user or vendor supplying electronic data interchange (EDI) capabilities, you need to know the impact these systems will have on enterprise and industry organization. INPUT has interviewed professionals in the Travel & Tourism industry who work both sides of the electronic commerce equation. We found out the major issues and opportunities that are impacting this dynamic industry ... *the information you need to know!*

... successful strategic planning

INPUT has identified the areas of major business opportunities including:

Projects in Progress — Which projects in the hotel, airline, car rental and travel service industries are most profitable? Is it too late to be a part of these successful projects?

Competitive Environment — What are the strengths and weaknesses of the major players? How can you leverage your organization's strengths and capitalize on your competitors' weaknesses in this environment?

... cost-effective tactical analysis.

Technical Environment — How far along is the industry in moving from proprietary to standardized systems? What will be the impact on your business?

Opportunities — How have recent changes in the industry created opportunities for future growth?

Proprietary Systems — How far along is the industry in moving from proprietary to standard systems? What will be the impact on your business?

Get INPUT's expert advice.

If you want to discuss any of the concepts in the report, or talk about *Electronic Commerce in Travel & Tourism*, you will have telephone access to our EDI expert.

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What You'll Find in This Report ...

INPUT examines how electronic network systems that interconnect companies are used in the conduct of travel and tourism in detail. You'll find the facts and expert opinion you need in these key areas ...

EXECUTIVE OVERVIEW

Electronic Commerce

- Opportunities—Users
 - Airlines
 - Hotels, Car Rental Agencies
 - Travel Agencies
- Opportunities—Vendors
 - Registration Systems
 - Multiple CRS Access & Third-Party Agency Software
 - Outsourcing of Community-Wide Systems Operations
 - Financial Systems

EXISTING & EMERGING ELECTRONIC COMMERCE SYSTEMS

- Computerized Reservation Systems
- Hotels
- Car Rental, Airline Reservation Systems
- Travel Agency Applications
- Financial Clearinghouses
- Customer Service
- Operations & Maintenance
- Air Cargo
- Traveler Information

OPPORTUNITIES & IMPACTS

- Airlines
- Non-Air Providers
- Travel Agents
- Non-Agency Channels
- Customer Service Applications

TRAVEL & TOURISM TRADING COMMUNITY

The Players

- Airlines
- Hotels & Motels
- Rail & Bus Carriers
- Travel Agents
- Packaged Tour Operators
- Financial Clearinghouses
- Credit Card Services

COMPETITIVE ENVIRONMENT

- Computer Reservation Systems
- Professional Services
- Network Services
- Airline Industry Organizations

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INPUT's EDI & Electronic Commerce Program

Examines the marketing, competitive, and economic issues of the movement from paper to electronic-based commerce.

- Electronic Data Interchange
- Point-of-Sale Data Applications
- Interactive Voice Response and Facsimile Systems
- Reservation Systems
- Buy/Sell Electronic Bulletin Boards
- Electronic Trade Payments
- Electronic Information Services for Commercial Transactions
- Automatic Identification Technologies
- Automated Trading Systems
- Electronic Mail Used for Trade

Custom Consulting

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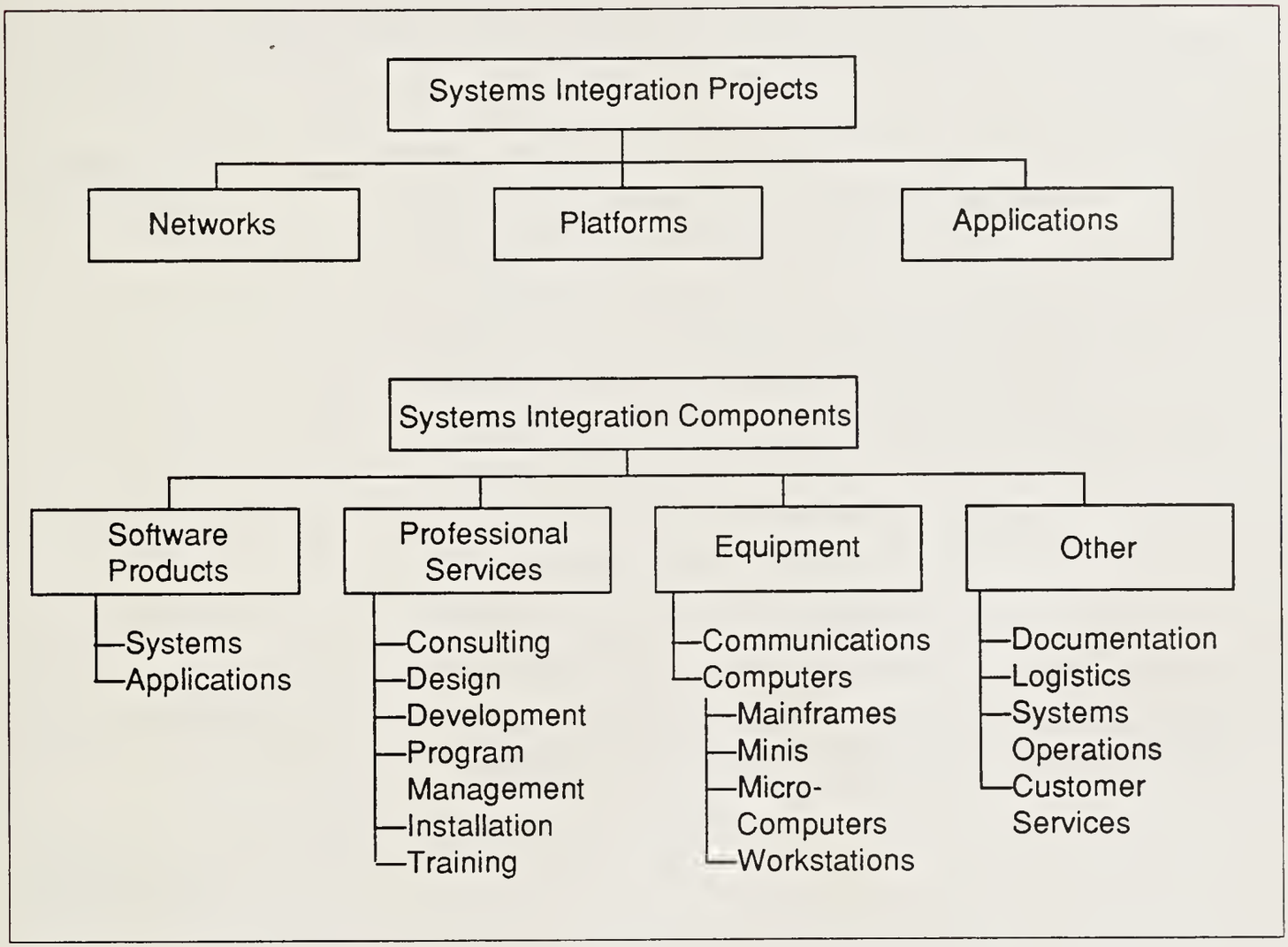
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Market and industry research and consultancy service supporting the business intelligence, marketing, and planning functions of organizations involved in systems integration.

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U.S. Systems Integration Program

SUMMARY

Market and industry research and consultancy service supporting the business intelligence, marketing, and planning functions of organizations involved in systems integration.

REPORTS	*Impact of Downsizing on Systems Integration* *Systems Integration Opportunities in Re-engineering* *Methods for Successful Systems Integration Projects* *Impact of Outsourcing on Systems Integration* *Networking Systems Integration Opportunities* *Systems Integration Trends and Forecasts, 1992-1997* *Systems Integration Competitive Analysis* *Systems Integration Technology Trends* *Subcontracting to Client Integrators* *Systems Management Direction and Priorities*
Research Bulletins	Regular reports on INPUT research findings and analysis of important industry announcements, trends, and issues.

SERVICES

Telephone Inquiry	Use the "hotline" to obtain answers to your immediate questions.
Access to INPUT Consultants	Obtain opinions and advice from INPUT executives and consultants from meetings, mail, fax, and the telephone.
On-Site Visit	Discuss your issues and concerns, introduce experts to your organization, and obtain presentations on industry trends.
Conference	Review the state of the industry and network with executives from other INPUT clients.

U.S. Systems Integration Program

BACKGROUND AND BENEFITS

During the second half of the 1980s systems integration (SI) emerged as one of the fastest growing markets for information systems and services. Today the economic recession and the revolutionary trends of downsizing, networking and outsourcing are creating a more difficult and challenging environment for systems integration.

Executives, planners and marketing staff need intelligence and data on the changes, opportunities and threats in this rapidly changing environment.

The **Systems Integration Program** builds on INPUT's 17 years of analyzing the professional services and systems integration industry. It provides insights on the reasons for and against systems integration; emphasizes buyer values, competitive offerings, and contract characteristics; and tracks market trends.

This program predicts the changes that affect your business.

Market Intelligence	Keep on top of SI market changes. Plan ahead so that you are not surprised. Base your plans on realistic, detailed forecasts.
Competitive Strategy	Plan positioning, strategy and tactics based on knowledge of key vendor activities. Plan distribution channel and partnering strategy. Identify potential providers of SI for specific opportunities.
Opportunity Identification	Identify user requirements and "hot" market issues. Make informed decisions. Avoid wasted time and energy: focus on the real needs.
Consulting Support	Build a professional support relationship with INPUT's experienced consultants. Test marketing ideas, strategies and tactics. Obtain market and vendor insights.
Networking	Develop working relationships with complementary outsourcing vendors through client conferences and INPUT staff.
Marketing	Promote your company's capabilities and interests through INPUT's worldwide client and contact network.

U.S. Systems Integration Program

PROGRAM DESCRIPTION

The **Systems Integration Program** forecasts the SI market for the next five years. It analyzes trends, issues, competition and opportunities in the rapidly changing SI market.

Systems integration is the provision of a complete solution to a complex information systems, networking or automation requirement through custom selection and implementation of a variety of information systems products and services. A systems integrator is responsible for the management of a systems integration contract and is the main point of contact and responsibility to the buyer for the delivery of the specified system on schedule and in budget.

The program tracks contracts to determine trends and validate market projections. It examines and forecasts the following market components:

- **Computer and communications equipment**
- **Software products**
- **Professional services**
- **Other products and services (e.g., operations support)**

Research covers communications network SI (market sizes exclude voice-only networks), platform SI (primarily technical projects where there is minimal applications software development), applications SI (where the prime focus is on the applications software), and desktop, office or departmental SI (where the projects are primarily carried out at the end-user level).

RELATED PROGRAMS AND SERVICES

Systems Integration Programme—Europe

Outsourcing Information Systems Programs (U.S. and Europe) provide research on the revolution in systems operations, network operations, applications management and desktop services opportunities.

Information Services Market Analysis Programs (U.S. and Europe) provide market forecasts, trend analysis and vertical industry reports for software products, professional services, systems integration, turnkey systems, systems operations, processing and network services.

Custom Research and Consulting Services satisfy unique needs for market research, competitive analysis, IS strategy development, acquisition support and other tasks based on INPUT's extensive experience and information resources.

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U.S. Systems Integration Program

CLIENT SUPPORT SERVICES

Clients gain maximum benefit from the industry research and consulting services available to them through the development of a strong, continuous relationship with INPUT staff. Through frequent contact and sharing of opinions and ideas, you receive a flexible response to changing areas of interest and focus. INPUT provides the following specific services in order to build a full relationship:

Consultant Access	Continuous support from INPUT's consultants and executives who are available to share opinions and reactions to events, and to discuss ideas and challenges.
Conference	Users and INPUT clients meet for a candid exchange of ideas on systems integration market issues. INPUT provides a detailed market forecast. Clients network with their counterparts and the users.
On-site Presentation	INPUT consultants present and discuss research findings at your site. Research presentations can be tailored to focus on your needs. Discuss specific interests and issues in confidence. This presentation is an excellent method of distributing key information through the organization and of obtaining more users of the research materials.
Telephone Inquiry Service	Satisfies requirements for short-term research needs (less than two hours), and clarification/amplification of report and presentation data.
Site Subscriptions	Complete program services to additional sites at substantially reduced fees.

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U.S. Systems Integration Program

REPORT DESCRIPTIONS

Impact of Downsizing on Systems Integration
There are several forms of downsizing. This report analyzes the impact of each of them on the SI market. It forecasts the market size and growth for the next five years. The nature of downsizing projects in terms of size and scope is examined together with user requirements, which are often different from IS-driven projects.

Systems Integration Opportunities in Re-engineering
This project analyzes the particular opportunities that occur when buyers use systems integration as part of organizational re-engineering. The 1990s will be a time of major transformation for all organizations as they adapt to changing markets, global competition and new financial and management structures. The transformation (re-engineering) process usually requires a new information systems infrastructure. This process will provide huge opportunities for vendors capable of extending their service offerings to handle user needs. The nature of these extended requirements is examined in this report as well as the buyer motivations.

Methods for Successful Systems Integration Projects
This report describes methods and processes used to manage successful systems integration projects. Examples of problems encountered and ways of overcoming them are presented. The research examines particularly the issues of risk reduction and management from the perspectives of vendors and buyers.

Impact of Outsourcing on Systems Integration
As the outsourcing revolution gathers momentum, there are serious implications for SI vendors. In applications systems operations and applications management contracts, new requirements for software are automatically passed to the contractor, thus excluding other vendors except on a subcontracting basis. Platform systems operations provide for preferred bidding by the contractor. This report analyzes the impacts of these developments on SI markets and vendors.

Networking Systems Integration Opportunities
Networks are the essential "glue" that enables the development of the electronic commerce marketplace of the future. Increasingly, voice, data, image (including fax) and message communications requirements are being considered together. At the same time, downsizing is enabled by networks. Thus, at many levels there are opportunities for SI. This report analyzes these opportunities and the various vendor offerings being developed to address them. Market forecasts are provided through 1997. The impact of outsourcing on network SI is predicted.

U.S. Systems Integration Program

REPORT DESCRIPTIONS *(Continued)*

Systems Integration Trends and Forecasts, 1992-1997
The SI market is forecast for the next five years by type of project and by vertical industry. Trends in the market by project type and size are presented. The impact of the economy and its development is projected.

Systems Integration Competitive Analysis
Provides profiles that describe and analyze the systems integration services of significant vendors; information is provided on their organization, capabilities, strategies, market focus and alliances. This report gives market shares of leading vendors and compares their positions, capabilities, strategies and tactics. Vendor profiles include:

- EDS
- IBM
- DEC
- Integris (BULL)
- CSC
- Andersen Consulting
- AT&T
- SHL Systemhouse

Systems Integration Technology Trends
Examines technologies currently being implemented in SI programs and projects and examines those users will seek over the next five years.

Subcontracting to Client Integrators
Focuses on the SI opportunities in the secondary SI market of user-managed projects. Includes a five-year forecast of user expenditures and recommendations for participation in this market segment.

Systems Management Direction and Priorities
This report examines the major factors that are causing the accelerated acceptance of systems integration and systems operations. It identifies the systems management trends that can be anticipated in the decade ahead.

U.S. Systems Integration Program

RESEARCH BULLETINS

Research Bulletins are frequent, short reports that:

1. Present results from research studies as quickly as possible. These Research Bulletins communicate key findings on issues, trends, new developments and ideas, market forecasts, and vendor analysis.
2. Provide INPUT's analyses of important industry announcements, events, awards, and other activities. These Research Bulletins analyze the meaning of these activities rather than just give the news.

Research Bulletins already published that are provided immediately include:

- *IBM Application Solutions Line of Business*
- *Network Integration—A Key Component of Systems Integration*
- *Electronic Imaging—Visions of Future Information Systems*
- *LAN Development and Management*
- *Systems Integration Market Forecast*
- *Groupe Bull Systems Integration Strategy*
- *Marketing Systems Integration*
- *Systems Integration Technology Trends*
- *Systems Integration: Subcontracting to Client Integrators*
- *Systems Integration Market—1991-1996*
- *Systems Management Priorities and Directions*
- *Systems Integration—An Evolving Industry*
- *State Government Information Systems—EBT to the Rescue*

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☐ $26,500 for the full program

☐ $16,500 for the U.S. Systems Integration Program *only*

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Date

The Latest Information on Systems Integration

INPUT has a report that can help you meet the rigorous demands for information in the systems integration market—a market where every major business force is in a state of constant and simultaneous change.

Systems Integration Vendor Analysis is a fine-grained evaluation of the 24 major players in systems integration and how they are shaping or being shaped by the forces transforming the market today. Do you need to know product and service offerings, organization, financial performance, and strategies? This report is an in-depth examination of these and other questions that give you much-needed insights into your competition or alliances.

This report is the best primary research available today on the central questions of the systems integration market.

In systems integration, the effects of technological and competitive changes are amplified by the very nature of the integration process. You have to keep abreast of these changes. Only timely and carefully researched analysis of these changes can give you a true advantage in this market. This report provides such an analysis.

A Window on the Competition

Systems Integration Vendor Analysis is the complement to INPUT's *Systems Integration Market Forecast* report and concentrates on the major competitors and competitive forces you have to face every day. It begins with an analysis of the structure of the market, management issues, and the major market forces operating in systems integration today, including:

- Major vendors' business objectives
- Vendors' views of user motivations
- Allocation of SI resources
- Vendors' market focus, by various classes of vendors
- The use of alliances
- The role of proprietary products
- Many other aspects of the competitive structure of the market and market players

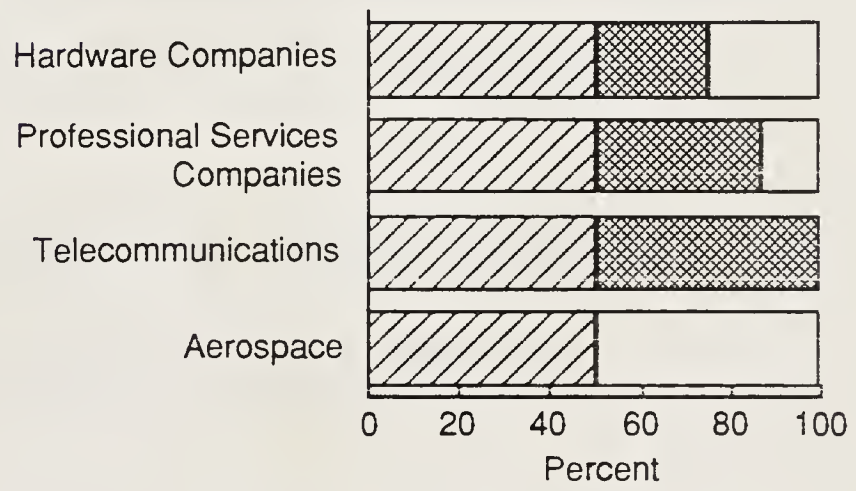
The majority of the report is detailed analyses of the 24 largest and most dominant vendors in this market. *Systems Integration Vendor Analysis* offers detailed examinations of product and service offerings, business results, alliances, markets and submarkets, competitive status, recent developments, market strategie— and more—for each of these 24 players. This gives you timely, targeted intelligence. It gives you a window on your competition or potential alliances.

Applied Experience

INPUT's report offers you the best available systems integration competitive analysis. This research can give you a tremendous competitive edge in one of the most complex and changeable markets in the information industry today.

Put INPUT's research on your team. Use the attached form to order your report today!

SI Vendors' Market Focus by Class



YES! I need to know the opportunities in systems integration! I want INPUT's report, *Systems Integration Vendor Analysis*. Please send me _____ copy (copies)

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California Clients please add applicable sales tax on 70% of your total.

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"INPUT believes the three primary factors that currently determine the competitive structure of the SI marketplace are:

- The strong channel orientation of the vendors, which is reflected in their SI business objectives, and impressions of the user issues that can be addressed by systems integration.
- Vendors' capabilities of providing solutions in particular vertical markets.
- Vendors' availability of specialized products or internal expertise that permits them to take a leadership position in the application of a particular technology or in a cross-industry market."

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Good Competitive Data On Systems Integration Can Be Hard To Find...

- What are the major players planning?
- What do users require from integrators?
- How are companies changing their offerings?
- How are vendors organizing?

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How can SI Vendors and Buyers Build Successful Relationships?

Find Out In INPUT's Report:

Methods For Successful Systems Integration

Capitalize On The Experience Of Others...

What's the best marketing tool a vendor can use?

- What prevents problems in SI contracts?
- How satisfied are users with SI vendors?
- Why do some vendors have a competitive advantage over others?
- Who are the key people in user organizations?

INPUT has answers to these questions and more!

Methods for Successful Systems Integration is based on hard data. SI vendors and users from a variety of businesses shared their first-hand experiences with INPUT.

Find out what is working for others. Although each systems integration contract is a custom solution, common approaches can be applied to program management and problem resolution.

This Report Will Benefit Your Company...

- Reduce your project's risk exposure by adopting proven successful techniques in risk reduction
- Improve your client relationships by learning what users want and need during a project
- Hire the people who have the proven characteristics of good program managers
- Enhance your success in systems integration projects based on recommendations from satisfied users and successful vendors.

This report is a guideline for measuring the potential success of existing engagements, and how to structure future SI relationships to produce a satisfactory solution for vendors and users.

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Dear Colleague;

Vendors and buyers approach systems integration (SI) engagements cautiously. Many unknowns exist in these engagements because the relationship between the vendor and customer is new. Structured program management techniques and processes should be practiced by both parties to control the variables in the dynamic SI environment. Specifically, as a vendor in this highly competitive business environment, you need to know:

Success Factors — How do vendors and buyers involved in SI programs define a successful relationship/program?

Contracts — Which type of contract is better—incentive-based or fixed-price?

Guidelines — What guidelines should be implemented to ensure successful systems integration contracts?

INPUT's report, *Methods for Successful Systems Integration*, focuses on techniques, processes and methodologies used by vendor and customer organizations to support systems integration implementation. Vendors will find *Methods for Successful Systems Integration* a must-read report to help develop models for successful systems integration, and to enhance existing programs.

Sincerely,

Alan Nilsen

Alan Nilsen
Program Manager,
U.S. Systems Integration Program

P.S. This report is also available as part of INPUT's U.S. Systems Integration Program. Reports in this series contain valuable planning information for both vendors and users. For more information about this report, or our program, call me directly at (703) 847-6870.

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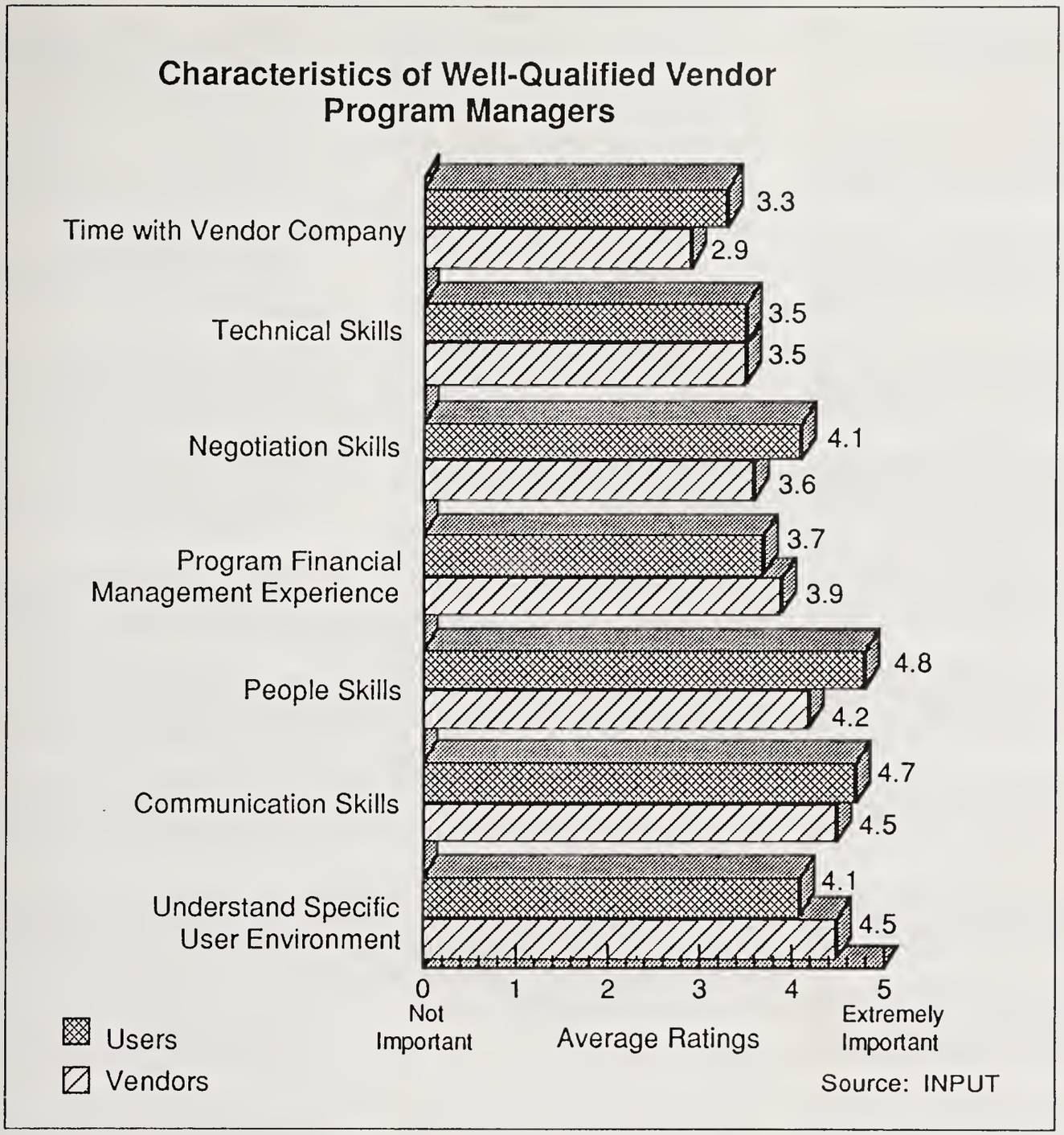
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INPUT conducts over 100 primary research studies for clients every year, many focused on downsizing topics. These have included analysis of product introductions, marketing strategies, competitive analysis and vendor merger/acquisition study. For users, INPUT has evaluated specific applications, costs of downsizing, vendor evaluation and the potential for outsourcing.

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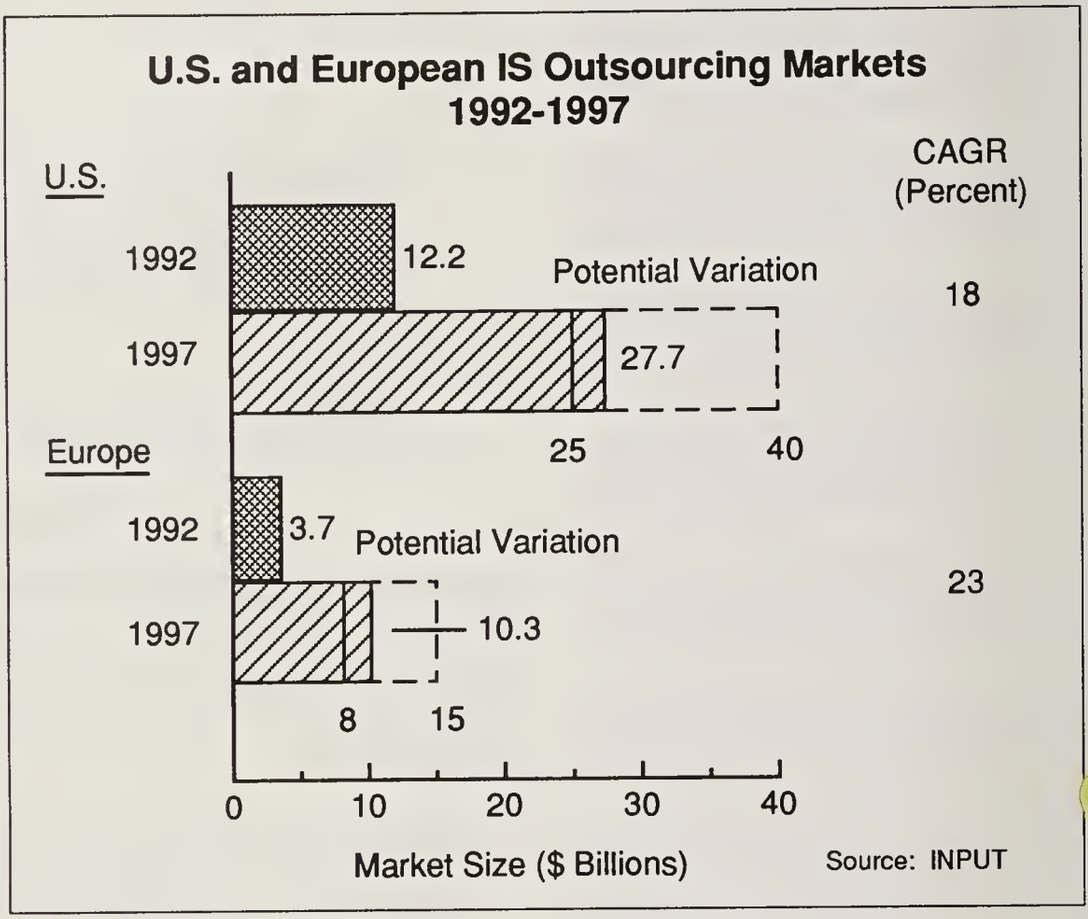
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Theory is great — but practice and experience is what you must base decisions on! See how buyer attitudes towards IS and outsourcing are changing. How informed are non-IS executives? What can cause attitudes toward outsourcing to change?

How Does IS Outsourcing Impact the IS Organization?

Impacts vary depending on the type of outsourcing adopted. You must know the options available in each case — sometimes over 90% of the IS work force is moved to the vendor; in other cases less than 10% is transferred. From this report you can determine the variability in impact by type of employee — and what can be done to address potential problems before they occur.

IS Outsourcing Is Changing ... Quickly!

Don't get left behind. See what is happening to contract length; what is being included in contracts today; how relationships between vendors and buyers are changing.

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Why are companies contracting for services to the desktop? What examples exist of such contracts? What do they include? Who is providing them? What are the requirements of and benefits to customers? How big will the market be? The answers to these and other questions on this exciting opportunity are *must* reading.

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Outsourcing Markets and Vendor Characteristics

How is the market segmented and which types of vendors address which market? What has been the performance in existing contracts? How do different types of vendors approach the markets and what are their capabilities? This mapping of the markets and the vendors is important to competitors and buyers alike.

How Is the Outsourcing Decision Made?

Examine the outsourcing decision process. Review the decision factors of executives and IS managers. How is vendor selection done? How is the outsourcing vendor managed? What about "insourcing"? Get the answers to these questions and to the fundamental question on the benefits of IS outsourcing!

Reality — How Does an Outsourcing Contracting Process Work?

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Reality—Examples of Outsourcing Contracts

Review case studies for five different types of outsourcing including the buyer expectations and results.

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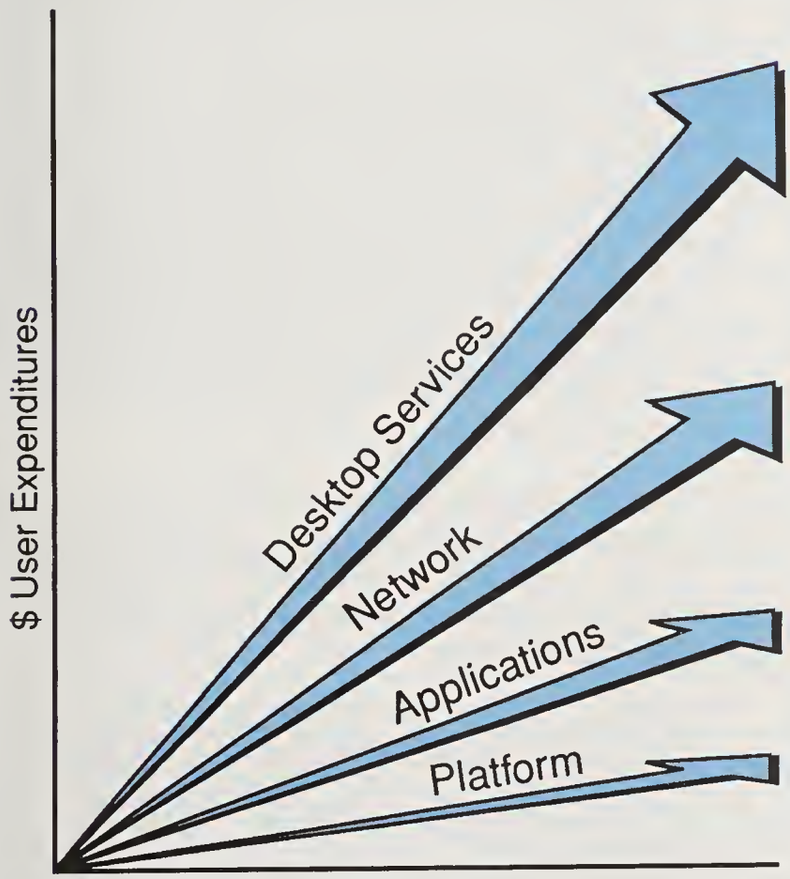
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The Outsourcing Contract —
Harry Glasspiegel, Partner,
Shaw, Pittman, Potts, Trowbridge
Creating a climate of trust, openness, and respect is an important first step to a successful outsourcing agreement. Learn the key issues a vendor and client need to address initially and how to build a healthy relationship from an attorney who specializes in outsourcing contracts.

Evaluating the Proposal —
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Andy Proctor, Director, Applied Computer Technology, The Genix Group
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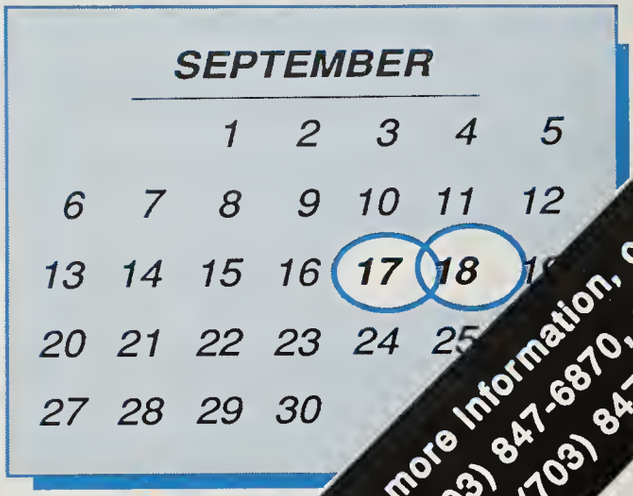
Keeping the Client Happy —
Dean Panagopoulos, Operations Manager, Ziff Information Services
Successful outsourcing depends on solid relationships. One poorly managed project can severely impact a vendor's reputation in the market. Learn the keys to a long-term, mutually beneficial vendor/client relationship.

Impact of Downsizing on Outsourcing —
Peter Cunningham, President, INPUT
Capitalize on the outsourcing phenomenon, identify new opportunities and strengthen your competitive position. Learn why downsizing is becoming a strategy of choice in the IT community, and why outsourcing is becoming a viable method of implementation and ongoing management. This emerging area holds great potential for growth. Understand what it takes to be successful...

Need for Change in the Outsourcing Market —
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Deciding what outsourcing prospects and opportunities to pursue can determine the profit of your strategy. Analyze the advantages and disadvantages of outsourcing. Understand why some companies decide against outsourcing and what drives these decisions.

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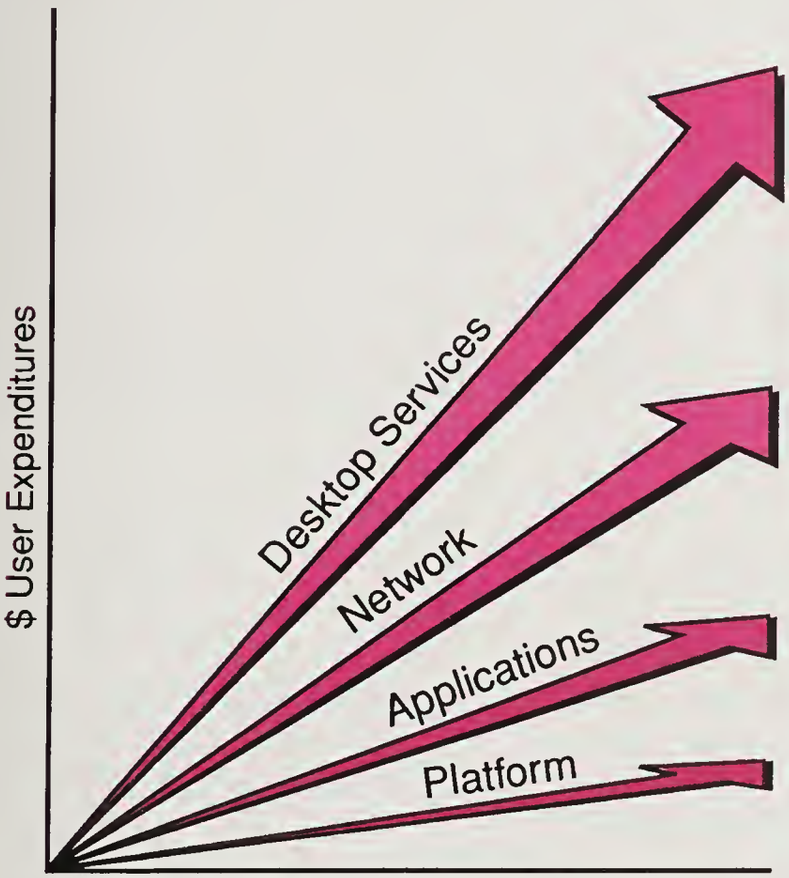
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- ☐ Also, please send me *additional* information on INPUT's Outsourcing Program

Attendance Fees:

- ☐ **Outsourcing Program Clients:** Two free attendees; $295.00 for each additional attendee
- ☐ **Clients of other INPUT programs:** $295.00 each
- ☐ **Non-clients:** $795.00 for first attendee; $545.00 for each additional attendee

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Cancellations are subject to a $50.00 cancellation fee. No refunds made after September 9, 1992.
INPUT reserves the right to make changes to this conference without notice.

PRELIMINARY AGENDA

DAY ONE

Outsourcing Market Forecast, 1992-1997 —
J.P. Richard, Vice President, INPUT
Get a solid basis for your business plans in the outsourcing market from this authoritative, comprehensive forecast and analysis.

The Outsourcing Contract —
Harry Glasspiegel, Partner,
Shaw, Pittman, Potts, Trowbridge
Creating a climate of trust, openness, and respect is an important first step to a successful outsourcing agreement. Learn the key issues a vendor and client need to address initially and how to build a healthy relationship from an attorney who specializes in outsourcing contracts.

Evaluating the Proposal — A Case Study
R. Dennis Wayson, Vice President, INPUT
Learn what prospects need to consider when evaluating outsourcing vendors. What are the major elements that prospective clients focus on, and where are the "show-stoppers?"

Handholding at Transition Time —
Andy Proctor, Director, Applied Computer Technology, The Genix Group
Discover how a successful vendor smoothly makes the transition from the client premises to vendor management. Share in his experience at meeting tight schedules and new demands.

Keeping the Client Happy —
Dean Panagopoulos, Operations Manager, Ziff Information Services
Successful outsourcing depends on solid relationships. Learn the keys to a long-term, mutually beneficial vendor/client relationship from a successful vendor.

DAY TWO

Impact of Downsizing on Outsourcing —
Peter Cunningham, President, INPUT
Learn why downsizing is becoming a strategy of choice in the IT community, and why outsourcing is becoming a viable method of implementation and ongoing management. This emerging area holds great potential for growth. Understand what it takes to be successful...

Need for Change in the Outsourcing Market —
Enron Corporation
Can vendors react fast enough to new client demands, or must clients look elsewhere for new ideas and new techniques? Learn what happens when clients' demands change soon after the contract is signed.

What's next in Outsourcing? —
Panel of INPUT Executives
Hear the experts summarize how the market is likely to change in the next few years. Ask them how to capitalize on these changes and put this revolution to work to help you realize your organizations's needs.



To register, or for more information, call Barbara Fisher at (703) 847-6870, or fax the enclosed form to (703) 847-6872.

About INPUT

INPUT is a worldwide consulting and market research firm uniquely focused on the information technology services and software markets. Executives in many technically advanced companies in North America, Europe, and Japan rely on INPUT for data, objective analysis, and insightful opinions to support their business plans, market assessments, and technology directions. By leveraging INPUT's considerable knowledge and expertise, clients make informed decisions more quickly, and benefit by saving on the cost of internal research.

Since 1974, INPUT has compiled the most extensive research base available on the worldwide information services market and its key segments, providing detailed market forecasts, vertical industry sector analysis and forecasts and analysis of vendor strategies and products. INPUT delivers specific expertise in the fast changing areas of outsourcing, systems integration, EDI/electronic commerce, software development/CASE, and on the impact of downsizing.

Consulting services are provided by more than 50 professionals in major international business centers. Clients retain INPUT for custom consulting/ proprietary research, subscription-based continuous advisory programs, merger/ acquisition analysis and detailed studies of U.S. federal government IT procurements.

Most clients have retained INPUT continuously for a number of years, providing testimony to INPUT's consistent delivery of high-value solutions to complex business problems. To find out how your company can leverage INPUT's market knowledge and experience to gain a competitive edge, call us today.

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Fax (03) 3864-4114

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- Why are users turning to outsourcing vendors for network management?
- Are the major communications vendors likely to enter the outsourcing market?

Learn the answers and more in INPUT's report:

Outsourcing Network Management and Operations

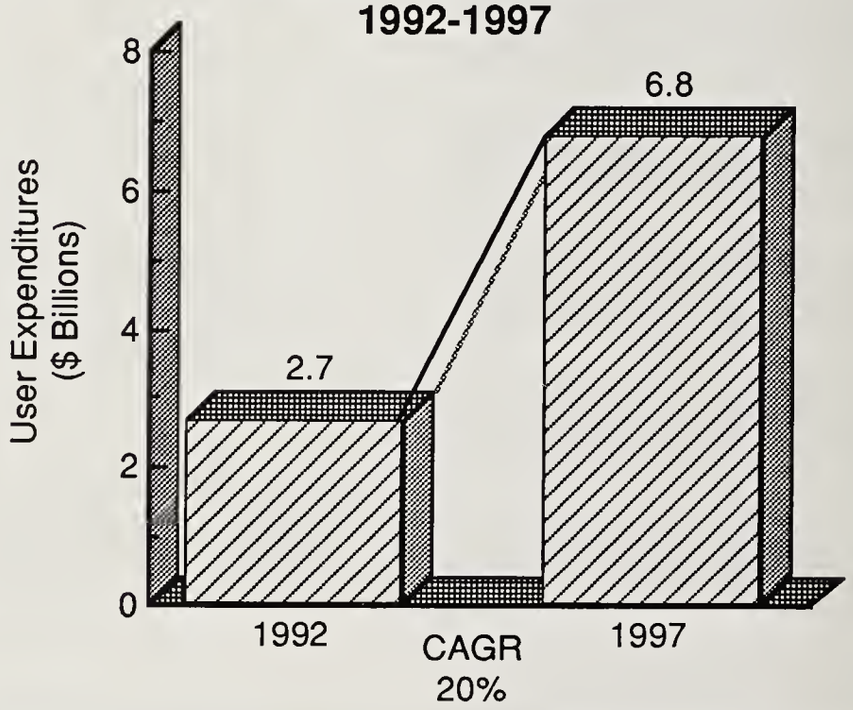
Let INPUT show you how and why the outsourcing market is changing

If you are involved in outsourcing, you'll want to know the answers to...

- How large is the market for outsourced network management?
- What strategies are vendors using to gain market share in this submarket?
- Why are buyers outsourcing their network management functions? Are they outsourcing all or just a piece of it?
- Is the same vendor being asked to provide systems operations management and network management?
- Will alliances/consortia emerge as a long-term strategy for outsourcing vendors in network management?

INPUT has the answers you need to these and other questions!

Network Management Outsourcing Expenditure Forecast 1992-1997



What this study is NOT...

INPUT doesn't offer the typical analyst opinion based on which way the wind is blowing. Opinions based on casual market observation only confuse everyone—and it isn't INPUT's style.

What this study Is...

An objective, unbiased view of IS outsourcing relationships based on hard data. Executives at over 45 major buyers and vendors of outsourcing and network services were interviewed in depth about their experiences in outsourcing of network management.

Learn from experience...

For both buyers and vendors of information systems outsourcing, learning about new options and the market nature is critical. Take advantage of the market experience to maximize your individual success and the success of your company.

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If you fill any one of these categories:

- **An outsourcing vendor currently seeking to expand your market share**
- **An IS vendor developing strategies for the outsourcing market**
- **A current buyer of outsourcing services**
- **A prospective buyer developing plans to purchase outsourcing services**

...then INPUT's latest report is *must* reading:

Outsourcing Network Management and Operations

In a "first of its kind" market research study, INPUT interviewed over 45 major buyers and providers of outsourcing and network services to identify the key factors in this changing market.

- **Are users turning over their network management problems to vendors?**
- **What part of the communications pie do users want managed for them?**
- **Are the traditional outsourcing vendors up to the task of providing network management?**
- **Can we expect the communications companies to emerge strongly in this market?**

This report provides answers to these and other questions that are becoming increasingly important as the outsourcing market matures and evolves to present a broader range of options to the potential buyer.

Interested? Have questions about how it pertains to your specific business? Fax us the reply sheet. We'll be happy to put INPUT's expertise in the information systems outsourcing market to work for you.

Sincerely,

J. P. Richard
Vice President

P.S. This report is also available as part of INPUT's Outsourcing Information Systems Program. Reports in this series contain valuable planning information for both vendors and users. For more information, please call me direct at (703) 847-6870.

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INPUT provides clients with objective analysis and insightful opinions on Outsourcing of Network Management.

ORDERS

About INPUT's report, Outsourcing Network Management and Operations...

Please send me the report for $2,250 ($2,500 after September 8, 1992)— California Clients: Please add applicable sales tax on 70% of the purchase price.

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- ☐ Please bill me ☐ Please bill my company

INFORMATION ONLY

- ☐ *I'd like to see more. Please send me the report Abstract and Table of Contents.*
- ☐ *I have questions about how the conclusions pertain to my business. Please have the author contact me.*

About INPUT's services...

Please keep me informed of future studies on...

- ☐ Outsourcing ☐ Systems Integration ☐ Downsizing ☐ IS Market Forecasts
- ☐ *Please send me information on INPUT's upcoming Outsourcing Conference in September.*

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The Benefits of this Report...

If you're a vendor, you need to know why users are looking more and more to vendors for network management expertise.

You need to assess if you are prepared to meet these demands.

If you're a user or prospective buyer, you need to be aware of what other users are doing and just what you can expect the vendor to do for you in the critical area of network management.

Vendor Benefits

- Find new sources of outsourcing revenue and profit.
- Prepare yourself to meet the changing demands of the market.
- Identify who might be the new players as the market evolves.
- Determine whether you need to form alliances or acquire new assets to continue being a full-service vendor.

Buyer Benefits

- Learn what other users are doing to solve their network management problems.
- Identify key vendors who can provide network management services.
- Measure the scope of your requirements and determine if they can be successfully outsourced.
- See which parts of the communications pie are being outsourced today ... and how that will change.

Capture the wealth of information INPUT's research staff has collected to define this emerging segment of the outsourcing market.

Order INPUT's latest report, Outsourcing Network Management and Operations

Call, fax, or mail your order to your nearest INPUT office

About INPUT

INPUT is a worldwide consulting and market research firm uniquely focused on the information services and software markets within the information technology industry. Executives in many technically advanced companies in North America, Europe, and Japan, rely on INPUT for data, objective analysis, and insightful opinions to support their business plans, market assessments, and technology directions. By leveraging INPUT's considerable knowledge and expertise, clients make informed decisions more quickly, and benefit by saving on the cost of internal research.

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Consulting services are provided by more than 50 professionals in major international business centers. Clients retain INPUT for custom consulting/ proprietary research, subscription-based continuous advisory programs, merger/ acquisition analysis and detailed studies of U.S. federal government IT procurements.

Most clients have retained INPUT continuously for a number of years, providing testimony to INPUT's consistent delivery of high-value solutions to complex business problems. To find out how your company can leverage INPUT's market knowledge and experience to gain a competitive edge, call us today.

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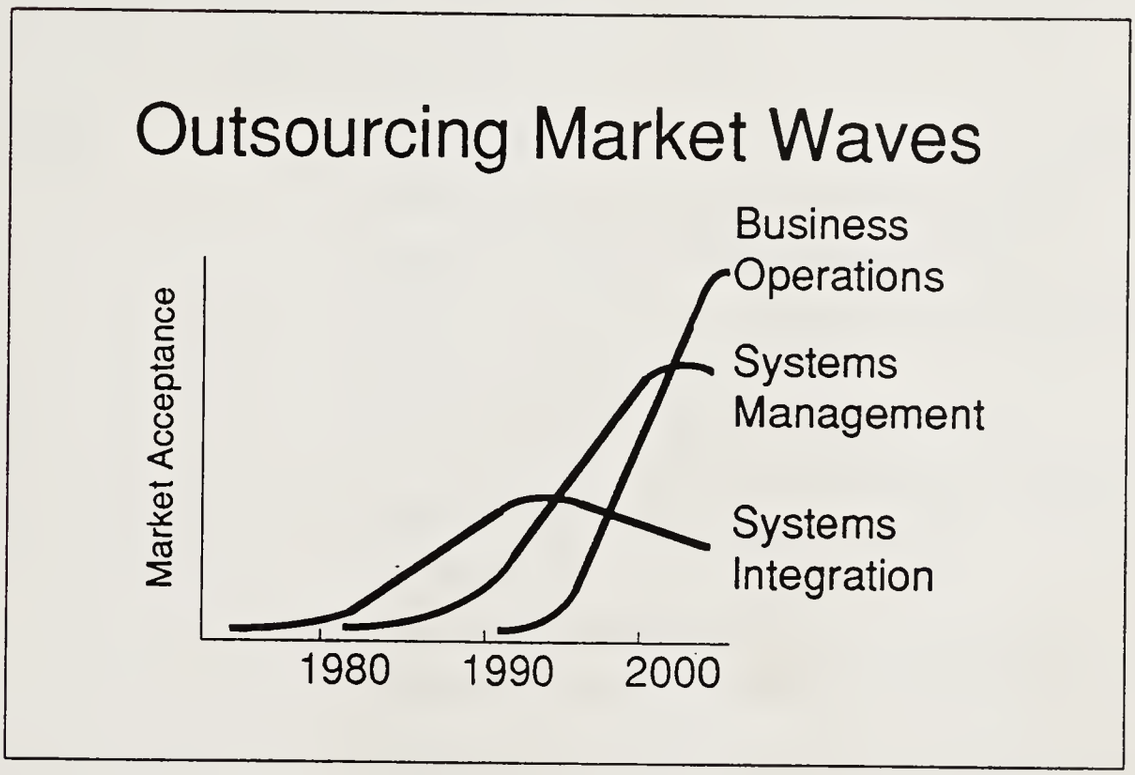
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U.S. Outsourcing Information Systems Program



Analyzes the outsourcing information systems revolution in the 1990s.

- **Systems Operations**
- **Network Operations**
- **Desktop Services**
- **Applications Development**
- **Applications Management**
- **Education and Training**

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U.S. Outsourcing Information Systems Program
—*The Potential $50 Billion Market*—

SUMMARY

Analyzes the information systems (IS) outsourcing revolution and opportunities in the 1990s. In-depth research covers the outsourcing of systems operations, applications development and maintenance, network operations, and desktop services. Builds on INPUT's 15 years' experience of analyzing the outsourcing phenomenon.

REPORTS	*Strategic Assessment of IS Outsourcing in 1992* *Interaction of Downsizing with Outsourcing* *Methods of Approaching IS Outsourcing* *Outsourcing Network Management and Operations* *Outsourcing Desktop Services* *Outsourcing Applications Management* *IS Outsourcing Market Opportunities, 1992-1997* *IS Outsourcing Competitive Analysis* *Outsourcing Awards Analysis* *Outsourcing Buyers' Issues and Alternatives* *Systems Management Priorities and Directions*
Research Bulletins	Regular reports on INPUT research findings and analysis of important industry announcements, trends, and issues.

SERVICES

Telephone Inquiry	Use the "hotline" to obtain answers to your immediate questions.
Access to INPUT Consultants	Obtain opinions and advice from INPUT executives and consultants from meetings, mail, fax, and the telephone.
On-Site Visit	Discuss your issues and concerns, introduce experts to your organization, and obtain presentations on industry trends.
Conference	Review the state of the industry and network with executives from other INPUT clients.

U.S. Outsourcing Information Systems Program

BACKGROUND and BENEFITS

A revolution is in the making in the 1990s. Increasingly vendors are taking responsibility for managing and operating information systems processes or functions.

The **Outsourcing Information Systems Program** builds on INPUT's 15 years of analyzing the outsourcing phenomenon. It provides insights on the reasons for and against outsourcing; emphasizes buyer values, competitive offerings, and contract characteristics; and tracks market trends.

Because outsourcing represents a shift in the method of contracting for existing operations rather than the creation of new operations, change can occur very rapidly. As a result, this revolution will have a dramatic impact on users and vendors. This program predicts these changes and resulting opportunities.

Keep on Top of this Revolutionary Market	Revolution means dramatic, non-linear change. This is happening in outsourcing. This program enables you to keep on top of, and indeed to predict, such changes.
Competitive Strategy	Identify what key vendors are doing in this market. Plan distribution channel strategy and competitive positioning. Identify potential, suitable providers of outsourcing services.
Opportunity Identification	Identify user requirements and "hot" market issues. Make informed decisions. Avoid wasted time and energy: focus on the real needs.
Consulting Support	Build a professional support relationship with INPUT's experienced consultants. Test marketing ideas, strategies and tactics. Obtain market and vendor insights.
Networking	Develop working relationships with complementary outsourcing vendors through client conferences and INPUT staff.
Marketing	Promote your company's capabilities and interests through INPUT's worldwide client and contact network.

U.S. Outsourcing Information Systems Program

PROGRAM DESCRIPTION

This program analyzes trends, issues, competition and opportunities in the rapidly expanding outsourcing markets.

Outsourcing of information systems is the contracting of all or a major part of an information systems process to an external vendor on a long-term (greater than one year) basis. The vendor takes responsibility for the performance of the process.

An extension of information systems outsourcing is the contracting of the business function itself, which embeds the information systems process. There are already examples of these market opportunities.

The focus of outsourcing is vendor assumption of the responsibility for:

- **Systems Operations (Facilities Management)**
- **Network Operations**
- **Applications Development** } **Applications Management**
- **Applications Maintenance** } **Applications Management**
- **Desktop Services (end-user support)**
- **Education and Training**

RELATED INPUT PROGRAMS

Outsourcing Information Systems Programme—Europe

Systems Integration Programs (U.S. and Europe) analyze opportunities for vendor-provided solutions to complex information systems, communications, and automation requirements.

Information Services Vendor Analysis Program provides profiles and capabilities analyses of information services vendors.

Information Services Market Analysis Programs (U.S. and Europe) provide forecasts, trend analyses, and industry reports for software products, professional services, turnkey systems, processing services, and network services.

Custom Research and Consulting Services satisfy unique needs for market research, competitive analysis, IS strategy development, acquisition support and other tasks based on INPUT's extensive experience and information resources.

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U.S. Outsourcing Information Systems Program

CLIENT SUPPORT SERVICES

Clients gain maximum benefit from the industry research and consulting services available to them through the development of a strong, continuous relationship with INPUT staff. Through frequent contact and sharing of opinions and ideas, you receive a flexible response to changing areas of interest and focus. INPUT provides the following specific services in order to build a full relationship:

Consultant Access	Continuous support from INPUT's consultants and executives who are available to share opinions and reactions to events, and to discuss ideas and challenges.
Conference	Users and INPUT clients meet for a candid exchange of ideas on outsourcing market issues. INPUT provides a detailed market forecast. Clients network with their counterparts and the users.
On-site Presentation	INPUT consultants present and discuss research findings at your site. Research presentations can be tailored to focus on your needs. Discuss specific interests and issues in confidence. This presentation is an excellent method of distributing key information through the organization and of obtaining more users of the research materials.
Telephone Inquiry Service	Satisfies requirements for short-term research needs (less than two hours), and clarification/amplification of report and presentation data.
Site Subscriptions	Complete program services to additional sites at substantially reduced fees.

For more details please contact your nearest INPUT office.

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U.S. Outsourcing Information Systems Program

REPORT DESCRIPTIONS

Strategic Assessment of IS Outsourcing in 1992
The outsourcing revolution is rapidly gaining momentum. In this report, INPUT looks at the factors behind the increased tendency for businesses to turn to outside sources to meet their IT needs. The report provides a framework for considering the various outsourcing alternatives.

Interaction of Downsizing with Outsourcing
Analyzes the potential conflict between outsourcing and downsizing. How can downsizing be implemented within an outsourcing contract? Can outsourcing be a vehicle by which downsizing is accomplished? Does downsizing itself create opportunities for outsourcing, for example, in the desktop services market? These and other questions are addressed by the research.

Methods of Approaching IS Outsourcing
In this project the various approaches adopted by outsourcing prospects are examined to determine those which are most effective. The procedures for identifying and analyzing those elements to be considered for outsourcing are identified. The processes used to identify and evaluate potential vendors are described. The type and level of effort required to carry out the whole process is analyzed, including the role of management consultants and other external suppliers.

Outsourcing Network Management and Operations
The drive towards communications-based information systems is intensifying rapidly; such systems are essential for electronic commerce and other inter-organizational communications. They can be sources of competitive advantage or critical components of organizational re-engineering. In addition, vendors are offering more comprehensive, network-based services. The *Outsourcing Network Management and Operations* study forecasts the demand for vendor management or provision of telecommunications networks on an outsourced basis. Driving forces and inhibiting factors are identified as well as user requirements and vendor offerings.

Outsourcing Desktop Services
The downsizing revolution and the resulting proliferation of PC and workstation networks, often connected in client/server structures, present major organizational and logistical challenges to IS management. The emergence of outsourcing opportunities related to downsizing and the growth of desktop and departmental computing is analyzed and forecast in this report. The nature and size of the contracts for end-user support, LAN management services, client/server management services, etc. are examined. User requirements and vendor strategies are presented for what may turn out to be one of the most rapidly growing markets of the 1990s.

U.S. Outsourcing Information Systems Program

REPORT DESCRIPTIONS *(Continued)*

Outsourcing Applications Management
As organizations face increasing pressure to manage both the development of new systems and the maintenance of existing ones, outsourcing the applications management (applications software design, implementation and maintenance) function becomes an increasingly attractive proposition. Building on a study conducted in 1991, this project analyzes user needs and motivations and the various approaches adopted by vendors to this rapidly developing opportunity.

Information Systems Outsourcing Market Opportunities, 1992-1997
Examines the issues, driving and inhibiting forces, opportunities and strategies in outsourcing. Forecasts each of the outsourcing markets for the next five years, particularly systems operations. Analyzes the outsourcing opportunities in vertical industry markets.

Information Systems Outsourcing Competitive Analysis
Provides profiles that describe and analyze the portfolio of outsourcing services of vendors with significant market presence together with financial data and information on the full range of services that they offer. Analyzes current and prospective market shares by segment. Compares vendor strategies, tactics, capabilities, positions and market focus. Vendor profiles include:

- EDS
- IBM
- DEC
- Systematics (ALLTEL)
- CSC
- Andersen Consulting
- ISM Systems (Canada)
- SCT
- Power Computing

Outsourcing Awards Analysis
Analyzes the publicly reported outsourcing contracts for 1989 to 1992. Provides vendor and client identity and descriptions, nature of the award, value, length of contract, and contract milestones.

Outsourcing Buyers' Issues and Alternatives
Examines the driving forces and major issues facing the information systems function. Looks in-depth at the considerations involved in employing a systems operations firm from the corporate, information systems and end-user perspectives.

Systems Management Priorities and Directions
Examines major factors causing accelerated acceptance of systems integration and systems operations. Identifies the systems management trends that can be anticipated in the decade ahead.

U.S. Outsourcing Information Systems Program

RESEARCH BULLETINS

Research Bulletins are frequent, short reports that:

1. Present results from research studies as quickly as possible. These Research Bulletins communicate key findings on issues, trends, new developments and ideas, market forecasts, and vendor analysis.
2. Provide INPUT's analyses of important industry announcements, events, awards, and other activities. These Research Bulletins analyze the meaning of these activities rather than just give the news.

Research Bulletins already published that are provided immediately include:

- *Network Operations Management*
- *Systems Operations Market*
- *IBM Commits to the Systems Operations Market*
- *Systems Operations—What Are the Real Issues?*
- *User's View of Systems Operations*
- *Network Operations Outsourcing*
- *Data Center Outsourcing—Successful Operations Are Also Candidates*
- *Application Systems Operations—The Other Part of the Business*
- *Application Systems Operations—A Growing Trend*
- *Buyer Issues and Alternatives*
- *Managing the Outsourcing Relationship*
- *Systems Operations/Outsourcing Forecast*
- *Largest Commercial Outsourcing Pact Signed*
- *Risk Assessment Strategies for Outsourcing Vendors*
- *The Systems Operations/Outsourcing Market in Japan*
- *Canadian Systems Operations/Outsourcing Market*
- *Two-tiered Outsourcing: Who's on First?*
- *EDS Strengthens its Manufacturing Position...Again*

Service Agreement

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Outsourcing Information Systems Program

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☐ Bill my company on purchase order number _____in the amount of $_____.

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OUTSOURCING:

What's Happening?
Where Is It Happening?
Who's Making It Happen?

- Which vertical markets has EDS penetrated?
- What's happening to the size of contracts over time?
- What were the biggest contracts in eight vertical markets?
- Who are the dominant players?
- What are their strategies?

INPUT Gives You the Strategic View in a New Kind of Outsourcing Analysis

Get a competitive edge in outsourcing!

Within each vertical market, INPUT analyzes the contract data to help you answer the questions you must address:

- What were the most significant contracts in each market?
- Who awarded them? Who won them? What were their values?
- Who are the dominant vendors in each market?
- What portion of contracts awarded are for less then five years? Five years? More than five years?

What exactly *is* happening in the outsourcing market?

This is one of the toughest research challenges in the industry. But INPUT has developed an entirely new research protocol designed specifically to answer that question.

And the results of this new approach have been distilled into a new report called the *Outsourcing Market Awards Analysis*, research that represents a powerful complement to more standard investigations into market sizes, issues, and trends. The report is available now.

INPUT's new approach is to compile all of the information available on significant outsourcing contracts already awarded in eight major vertical markets. INPUT then sorts the contracts by year, by length, by size, by vertical market, by vendor, and several other criteria, yielding a portrait of actual contract activity and trends over the past three years.

These contracts are the fundamental building blocks of actual market activity. By looking closely at them, INPUT is able to derive some useful conclusions about the outsourcing market and to allow you to trace trends that you think will have the most significant impact on your business.

Industry Analysis

Two chapters make up the majority of the body of the report and contain much of the data and analysis. Chapter III of the report is an "Industry Analysis" that presents the contract data sorted by eight vertical industries:

- Banking
- Discrete Manufacturing
- Process Manufacturing
- Retail Distribution
- Business Services
- Insurance
- State and Local Government
- Federal Government

In addition, this chapter provides analyses and notes concerning unusual contract activity, large contracts that could affect the market, and changes in trends in particular industries.

Vendor Analysis

Chapter IV of the report is a "Vendor Analysis" that analyzes a representative set of contracts won by each of eight vendors over the past three years:

- EDS
- IBM (ISSC)
- Andersen Consulting
- CSC
- The Genix Group
- Power Computing
- ACS Commercial Services
- Systematics

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Dear Colleague:

Transform your perceptions of your marketplace with the kind of analysis that you can only get from INPUT.

INPUT has developed a whole new research protocol that gives you hard data on the fundamental building blocks of the outsourcing marketplace—actual contracts awarded. And we've captured that research in a report titled ***Outsourcing Market Awards Analysis*** that is the perfect complement to the standard approaches of market forecasting and trend analysis.

This report analyzes the outsourcing contracts awarded in eight vertical markets over the past three years and comes up with some surprising conclusions and recommendations about where outsourcing is headed and how you can help it get there.

- Where were the significant contracts awarded? How big were they? Who got them?
- Who are the major players in this market? What is their penetration in these eight markets? What are the characteristics of their major contracts?
- How are the numbers of contracts growing in these eight markets?

INPUT's report addresses all of these questions and more. Get your answers today, when you need them most.

Put INPUT's researchers on your team. Please review the enclosed brochure and use the order card to get your copy of *Outsourcing Market Awards Analysis* today.

Best Regards,

J.P. Richard
Vice President

P.S. This report is also available as part of INPUT's Outsourcing Information Systems Program. For more information on this report or the program, please call Richard Perrotti, (703) 847-6870.

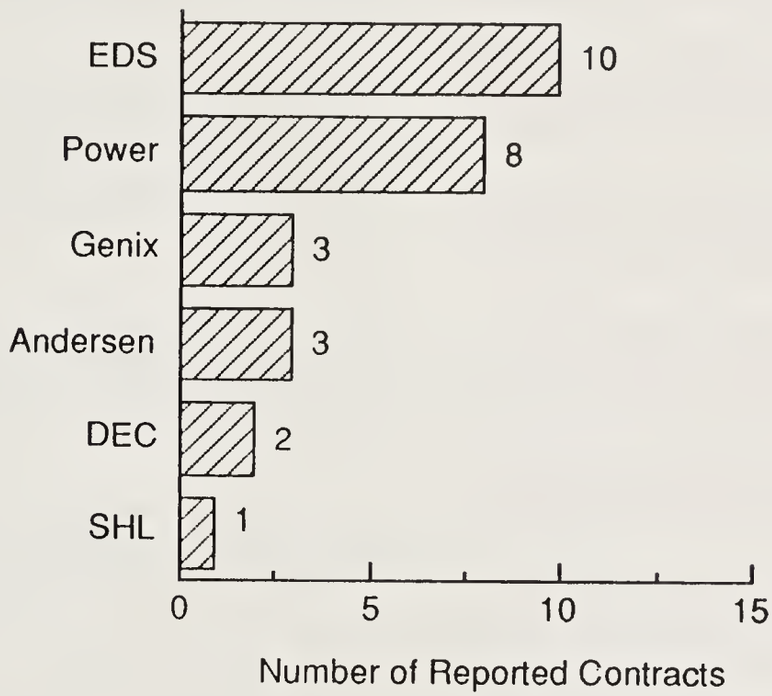
The analysis of each vendor includes information that can be an enormous help in focusing your competitive analyses:

- How long has each vendor been in the outsourcing business?
- What is unusual about their approach? Do they have very large contracts or small ones? Are they in many vertical industries or few?
- Have they formed strategic alliances? How are these working out?
- What is their industry penetration?
- What are the values of five representative contracts?
- What are the terms? Do they include platform operations? Applications development and maintenance? Network management? Desktop services?

Plus a short analysis of trends specific to each vendor and how they are responding to changing conditions in their marketplaces.

Do you want to know what's actually happening out there in the outsourcing market? INPUT's ***Outsourcing Market Awards Analysis*** is the only report that can tell you.

Process Manufacturing Vendor Participation



GETTING A FIX on major vendors' activities in specific vertical markets is just one of the things INPUT's outsourcing report allows you to do.

Our research concentrates on the fundamental building blocks—actual contracts awarded—and then examines those elements to give you the "Big Picture" analysis that is so hard to come by in this rapidly growing market.

Get a look at the Big Picture now, when it can help you most. Use the enclosed order card to order your copy of INPUT's *Outsourcing Market Awards Analysis* today.

Call, fax, or mail your order to your nearest INPUT office

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

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Tokyo 101, Japan
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INPUT®

How do buyers and vendors determine a successful outsourcing relationship?

Learn how in INPUT's report:

Methods of Approaching IS Outsourcing

Develop a successful outsourcing relationship with expertise from INPUT

If you are involved in outsourcing, you'll want to know the answers to...

- On a 5 point satisfaction scale, what percentage of buyers rate their outsourcing vendor a "4" or "5"? What gives these vendors the edge?
- How do buyers evaluate contract price? How often does the low bidder win?
- Does subcontracting make a vendor's offer less attractive? Does this practice lead to fewer awards?
- Are buyers willing to pay for value-added service from a vendor? Do they see benefits?
- What types of IS outsourcing are growing fastest? Why?
- How often do buyers outsource to multiple vendors?

INPUT has the answers you need!



THE IMPORTANCE OF RELATIONSHIP MANAGEMENT

INPUT's authoritative analysis of IS outsourcing relationships defines an eight-stage model and examines what is takes for buyers and vendors to be successful in each.

What this study is NOT...

INPUT doesn't offer the typical analyst opinion based on which way the wind is blowing. Opinions based on casual market observation only confuse everyone—and it isn't INPUT's style.

What this study Is...

An objective, unbiased view of IS outsourcing relationships based on hard data. Executives at over 50 major buyers and vendors of outsourcing services were interviewed in depth about their experiences in outsourcing relationships.

Learn from experience...

For both buyers and vendors of information systems outsourcing, entering the relationship is a major strategic commitment—and managing it can make or break a career. Take advantage of the market experience and maximize your individual success and the success of your company.

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Are you a ...

- **Vendor currently providing outsourcing services?**
- **Vendor developing strategies for the outsourcing market?**
- **Buyer of outsourcing services?**
- **Buyer developing plans to purchase outsourcing services?**

... then INPUT's latest report is must reading:

Methods of Approaching IS Outsourcing

In a "first of its kind" market research study, INPUT interviewed over 50 major buyers and vendors of outsourcing services to examine the buyer/vendor relationships...

- **How do users rate their outsourcing vendors?**
- **What are the keys for a successful relationship?**
- **How can vendors and buyers maximize their results in a "win-win" situation?**

For buyers and vendors practicing outsourcing today, or for those examining the opportunity, this report provides answers to the questions that define a successful relationship ... and provides insights into how to develop them.

Interested? Have questions about how it pertains to your specific business? Fax us the reply sheet. We'll be happy to put INPUT's expertise in the information systems outsourcing market to work for you.

Sincerely,

J. P. Richard
Vice President

P.S. This report is also available as part of INPUT's Outsourcing Information Systems Program. Reports in this series contain valuable planning information for both vendors and users. For more information, please call me direct at (703) 847-6870.

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Company _____

Address _____

City _____

State _____ Zip _____

Phone _____ Fax _____

INPUT provides clients with objective analysis and insightful opinions on Information Systems Outsourcing.

About INPUT's report, Methods of Approaching IS Outsourcing...

Please send me the report for $2,245 ($2,495 after June 30, 1992) — California Clients: Please add applicable sales tax on 70% of the purchase price.

My payment method is...

- ☐ Purchase order number _____
- ☐ Check enclosed
- ☐ American Express card # _____ exp. _____

 Signature _____
- ☐ Please bill me ☐ Please bill my company

- ☐ *I'd like to see more. Please send me the report abstract and table of contents.*
- ☐ *I have questions about how the conclusions pertain to my business. Please have the author contact me.*

About INPUT's services...

Please keep me informed of future studies on...

- ☐ Outsourcing ☐ Systems Integration ☐ Downsizing ☐ IS Market Forecasts
- ☐ *Please send me information on INPUT's upcoming Outsourcing Conference in September.*

My responsibilities extend beyond North America. Send me information on...

- ☐ Studies/Forecasts in Europe ☐ Studies/Forecasts in Japan ☐ Custom Consulting
- ☐ INPUT's *Worldwide Information Services Market Forecast, 1991-1996* of 30+ countries

Keep us informed...

- ☐ *My responsibilities have changed. Please direct future information to:*

Name _____ Address _____

Title _____ City _____

Company _____ State _____ Zip _____

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INPUT®

The Benefits of this Report...

Before you invest more staff time and capital in developing or managing an outsourcing relationship, read this report. It will tell what's important—and what isn't—in developing successful, long-term vendor/buyer relationships.

Vendor Benefits

- Maximize your outsourcing service revenues and profits by identifying...
 - How buyers are rating you—and your competition
 - Your chances of contract renewal—or losing it to another vendor
 - What services your clients value—and what they'll pay for
 - The keys to developing winning proposals—and winning relationships

Use this report as a guideline to measure your existing relationships, evaluate lost opportunities and plan your next successful proposal.

Buyer Benefits

- Choose and manage outsourcing vendor partnerships that minimize cost and maximize service by identifying...
 - The value of shorter term contracts—and the costs
 - The most popular outsourced functions—and your company's opportunities
 - The business cycle timing offering the best outsourcing opportunites
 - How successful relationships are negotiated

Use this report to discover outsourcing opportunities for your firm, evaluate vendor relationships and prepare for big-ticket service negotiation.

Capitalize on the experience of companies that have gone through all phases of the outsourcing process. Order INPUT's latest report, Methods of Approaching IS Outsourcing

Call, fax, or mail your order to your nearest INPUT office

About INPUT

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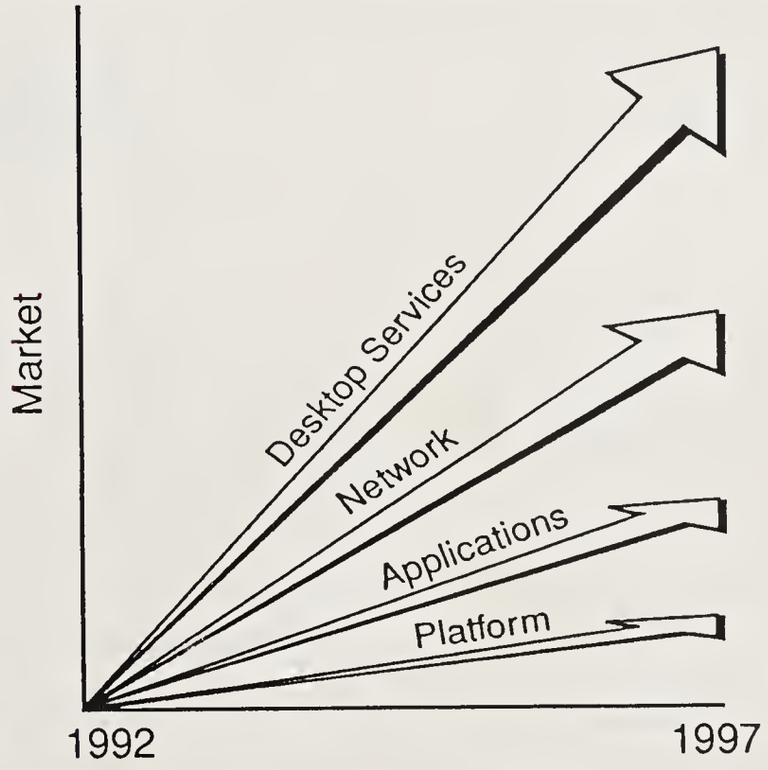
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INPUT®

Is the Outsourcing Revolution Slowing Down?

... or just Catching Its Breath?

Changing Outsourcing Options



INPUT's new report,

Information Systems Outsourcing Market Opportunities, 1992-1997,

answers this important question and more!

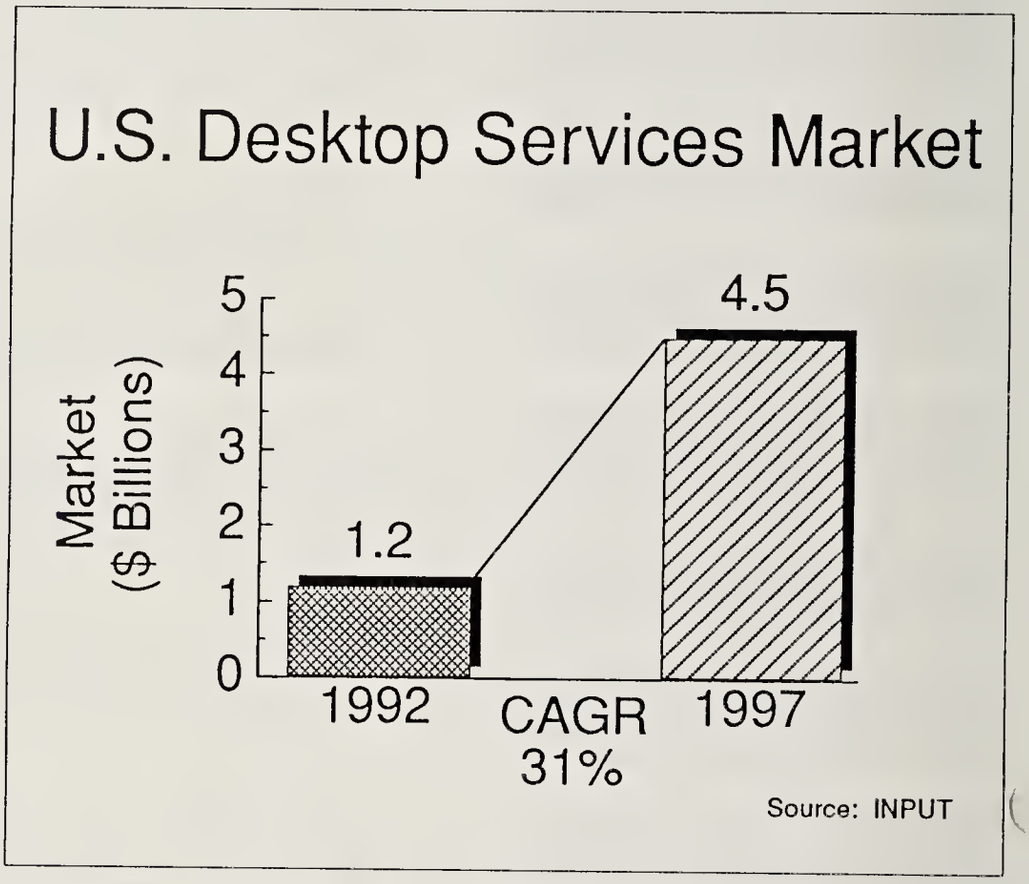
Outsourcing Is Changing Its Stripes ... Do You Know How to Benefit From these Changes?

Vendors

- Clients want you to take on additional responsibilities
- Prospects are less willing to sign long-term contracts
- You need to help the client downsize operations
- It's no longer just a data center management problem
- You must be ready to do systems integration also

Buyers

- As you downsize, the outsourcing vendor can help
- Your PC/workstation management problem is worse than your data center management problem
- Take advantage of outsourcing to make the transition to a new, downsized environment
- Just how important is that applications software to your business?



Vendor Benefits

- Know what the market leaders are doing
- Learn how users evaluate you
- Find out how the market is expanding to new options
- Assess how well you can change to meet demands
- See where the market is going in your targeted markets

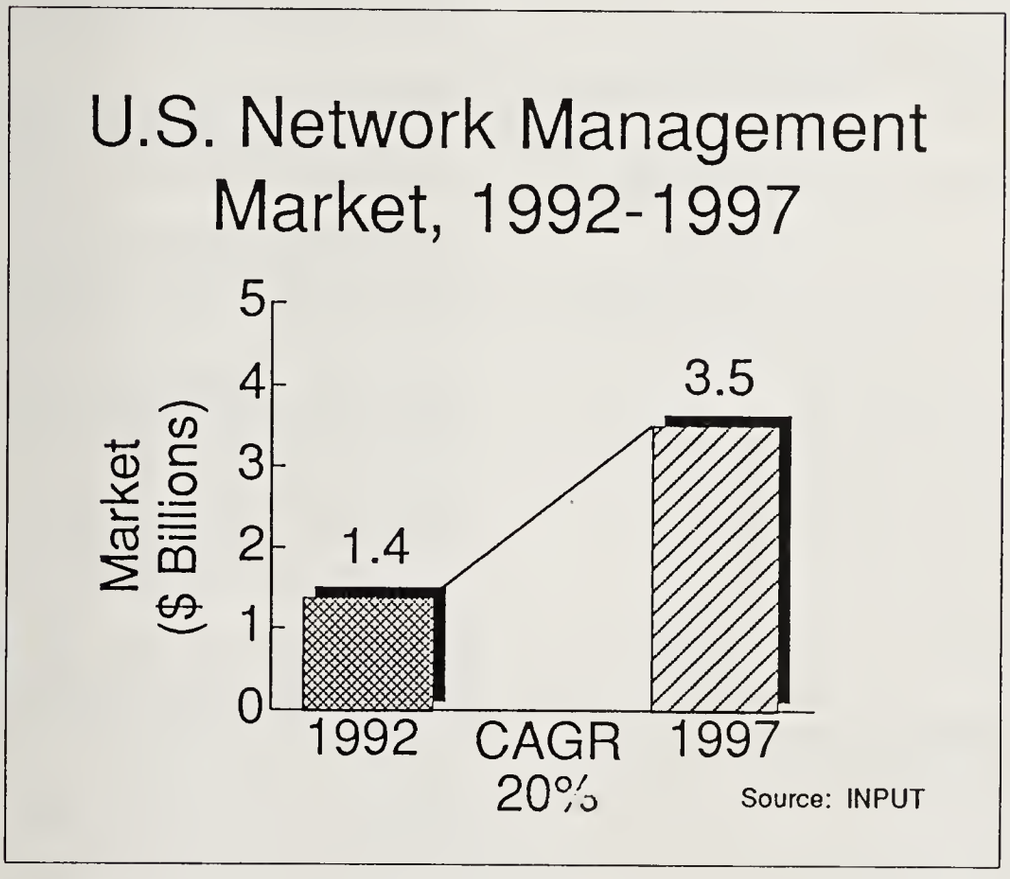
User Benefits

- Understand just what you can ask vendors to do
- Learn how early outsourcing arrangements are changing
- Identify the top vendors in your industry
- Gain insight into how to use vendors to make the transition
- Consider how the outsourcing arrangement can help you better manage resources

Whether Vendor or Buyer, Participate in the Downsizing Revolution Today ...

INPUT®

Use Outsourcing to Effectively Meet the Empowered Users' New Demands ...



Buyers

- Let a vendor manage the PC inventory nightmare
- Call in experts to manage the "hot-line" function

Vendors

- Act as a change agent by providing transition support
- Set up to provide local support across the country

Outsourcing Options Increase and New Choices Promise to Make the Market Grow Faster

INPUT's report, ***Information Systems Outsourcing Market Opportunities, 1992-1997***, identifies a major shift in outsourcing for the first time this year. Traditional platform and applications operations arrangements continue to grow, but the major new growth is in network management and desktop services.

The downsizing revolution is causing users to demand new services to connect and manage all the distributed power that has been given to the user organizations. Outsourcing vendors are quick to respond to the need.

Call, fax, or mail your order to your nearest INPUT office

About INPUT

Since 1974, information technology (IT) users and vendors throughout the world have relied on INPUT for data, objective analysis, and insightful opinions to support their plans, market assessments and technology directions particularly in computer software and services. Clients make informed decisions more quickly and save on the cost of internal research by using INPUT's services.

Call us today to learn how your company can use INPUT's knowledge and experience to grow and profit in the revolutionary IT world of the 1990s.

Annual Subscription Programs

North American and European Programs

Analysis of Information Services, Software, and Systems Maintenance Markets
5-year Forecasts, Competitive and Trend Analysis

- 9 Categories of Software and Services
- 15 Vertical Markets
- 7 Cross-Industry Markets
- The Worldwide Market (30 countries)

U.S. Programs

- Outsourcing (vendor and user)
- Downsizing (vendor and user)
- Systems Integration
- EDI and Electronic Commerce
- IT Vendor Analysis
- U.S. Federal Government IT Procurements

European Programs

- Outsourcing (vendor and user)
- Downsizing (vendor and user)
- Systems Integration
- Corporate Networks
- Customer Services

Custom Consulting

Many vendors leverage INPUT's proprietary data and industry knowledge by contracting for custom consulting projects to address questions about their specific market strategies, new product/service ideas, customer satisfaction levels, competitive positions and merger/acquisition options.

INPUT advises users on a variety of IT planning and implementation issues. Clients retain INPUT to assess the effectiveness of outsourcing their IT operations, assist in the vendor selection process and in contract negotiation/implementation. INPUT has also evaluated users' plans for systems and applications downsizing.

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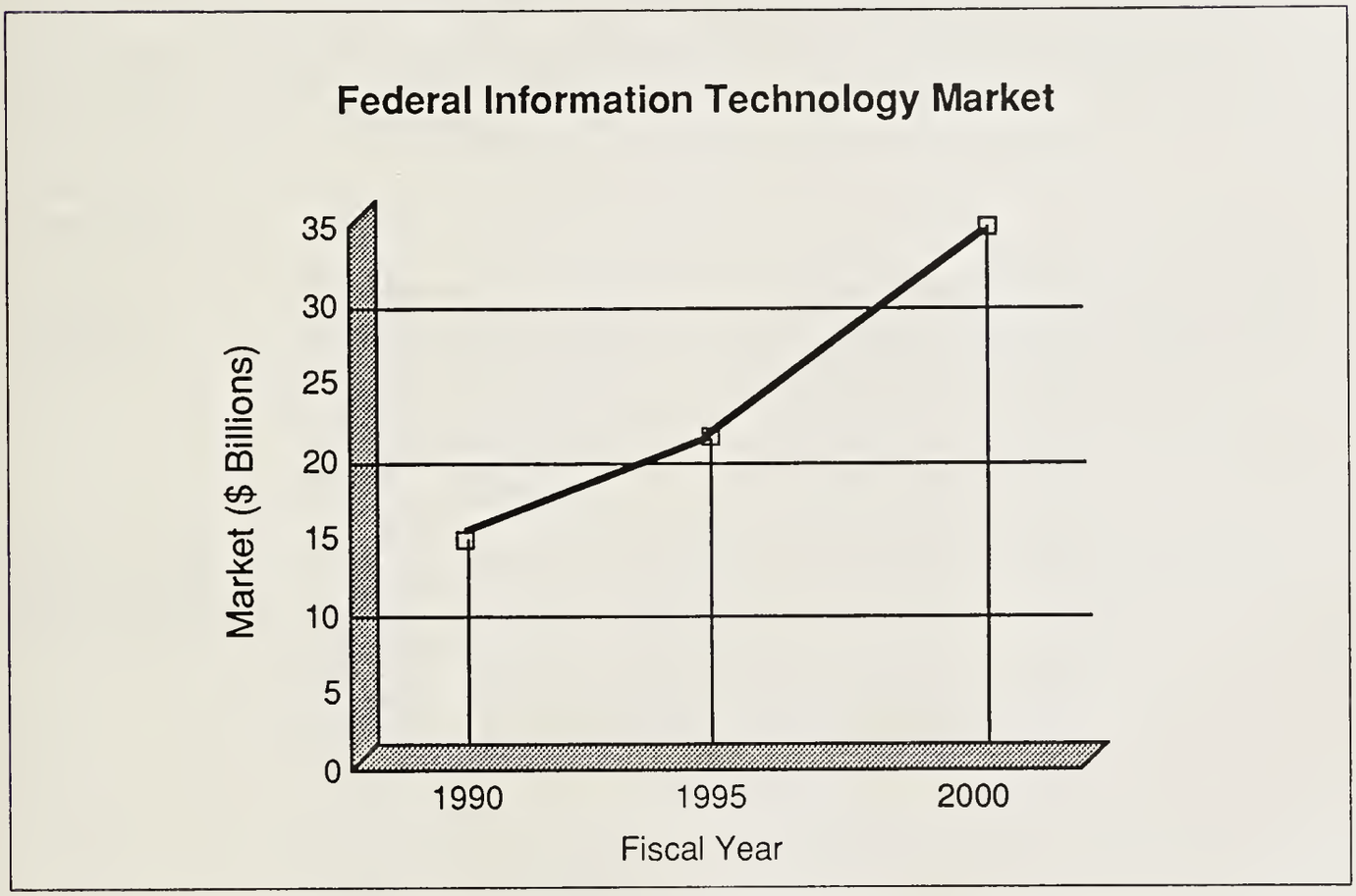
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FITMP

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Federal Information Technology Market Program



Analyzes the information technology plans and opportunities in the U.S. federal government

Forecasts markets for:

- Computer Equipment
- Software Products
- Systems Operations
- Processing Services
- Network Services
- Professional Services
- Systems Integration
- Turnkey Systems
- Office Information Systems
- Maintenance Services
- Telecommunications Systems and Services

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Federal Information Technology Market Program

SUMMARY

Analyzes the information technology (IT) plans and opportunities of the federal government. In-depth research on forces driving the market, technology and procurement trends. Forecasts information technology markets and analyzes competitors' positions in them.

REPORTS

Federal Market Reports

Outsourcing
Telecommunications
Computer Equipment
Computer Security
Network Management
Systems Integration
Information Systems and Services
Geographic Information Systems
Electronic Data Interchange
Software and Related Services
Electronic Imaging
Professional Services

Agency and Issue Reports

Opportunities in Downsizing in Federal Information Systems
High-Performance Computing in the Federal Market
DISA Information Services
IT Buying Trends: DoD/NASA/Civilian Agencies
Federal CIM Information Services Market
Agency Recompete Practices in SETA and Systems Operations Contracts
Agency Pricing Practices in Professional Services Contracts
Federal Market Briefs

Research Bulletins

Regular reports on INPUT research findings and analysis of important industry announcements, trends, and issues.

SERVICES

Telephone Inquiry

Use the "hotline" to obtain answers to your market questions immediately.

Access to INPUT

Obtain informed opinions and advice from INPUT executives and consultants from meetings, mail, fax, and the telephone.

Breakfast Meetings

Discuss the issues and trends of specific segments of the federal market (pre-announced).

Conference

Review the state of the industry and network with executives from other INPUT clients.

INPUT®

Federal Information Technology Market Program

BACKGROUND and BENEFITS

Despite continuing budget constraints, Defense Department downsizing and an extraordinarily complex procurement process, the federal market for information systems products and services continues to grow, albeit at a slower rate. The changes in agency focus and fewer large-scale opportunities have sharply changed the level and intensity of competition.

As competition increases, executives, planners and marketing staff need intelligence and data on the changes, opportunities and threats in this dynamic environment.

The **Federal Information Technology Market Program** builds on INPUT's 9 years of analyzing the federal industry. It provides insights on the methods and practices of government contracting for information technology; emphasizes buyer values, competitive offerings and contract characteristics; and tracks market trends. This program predicts the changes that affect your business.

Market Intelligence	Keep on top of federal market changes. Understand and act on the driving forces identified by realistic, detailed, well-informed forecasts of federal IT market segments.
Competitive Strategy	Identify what key vendors are doing in this market. Plan teaming and competitive strategy. Identify competition for federal systems and services.
Opportunity Identification	Commit internal resources to those products and services with the greatest federal market potential.
Consulting Support	Build a professional support relationship with INPUT's experienced consultants. Take advantage of INPUT's government contacts and insights.
Networking	Develop working relationships with complementary vendors through client conferences and INPUT staff.
Marketing	Promote your company's capabilities and interests through INPUT's industrywide client and contact network.

Federal Information Technology Market Program

PROGRAM DESCRIPTION

Provides a five-year forecast of the federal IT market including detailed forecasts of various market segments. It analyzes the forces driving the market, including legislation, funding, procurement regulations, congressional mandates, administration initiatives, and public expectations.

Each report includes the results of agency interviews, which provide clients detailed information on agency plans, preferences, and perceptions.

The bulletins address particular technology, agency, or administrative initiatives.

Contract awards and agency plans are investigated to determine trends and forecast the following market segments:

- **Computer Equipment**
- **Software Products**
- **Systems Operations**
- **Processing Services**
- **Network Services**
- **Professional Services**
- **Systems Integration**
- **Turnkey Systems**
- **Office Information Systems**
- **Maintenance Services**
- **Telecommunications Systems and Services**

RELATED INPUT PROGRAMS

Federal Information Technology Procurement Program provides a data base on more than 400 significant active federal IT procurements and 600 awarded contracts. It provides FOIA and teaming support, as well as rapid response to procurement inquiries.

Information Services Market Analysis Programs (Worldwide, U.S. and Europe) provide forecasts, trend analyses, and industry reports for software products, professional services, turnkey systems, processing services, and network services.

Information Services Vendor Analysis Program provides profiles and analyses of government and commercial information services vendors.

Custom Research and Consulting Services satisfy unique needs for federal market research, client satisfaction, competitive analysis, and market strategy information. INPUT also provides proposal preparation and acquisition support.

INPUT®

Federal Information Technology Market Program

CLIENT SUPPORT SERVICES

Clients gain maximum benefit from the industry research and consulting services available to them through the development of a strong, continuous relationship with INPUT staff. Through frequent contact and sharing of opinions and ideas, you receive a flexible response to changing areas of interest and focus. INPUT provides the following specific services in order to build a full relationship:

Consultant Access	Continuous support from INPUT's consultants and executives who are available to share opinions and reactions to events, and to discuss ideas and challenges.
Conference	Senior agency officials and INPUT clients meet for a candid exchange of ideas on federal IT issues. INPUT provides a detailed forecast of the market and discusses various market niches. Clients can network with their counterparts and agency personnel.
Breakfasts	INPUT addresses the research results of a particular project and related issues several times a year.
Telephone Inquiry Service	Satisfies requirements for short-term research needs (less than two hours), and clarification/amplification of report and presentation data.
Site Subscriptions	Complete program services to additional sites at substantially reduced fees.

For more details please contact your nearest INPUT office.

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Tokyo Tel. (03) 3864-0531; Fax (03) 3864-4114

Federal Information Technology Market Program

FEDERAL MARKET REPORT DESCRIPTIONS

Federal Outsourcing Market
While the outsourcing revolution gathers momentum in the private sector, there are significant changes developing in the federal outsourcing market, with serious implications for vendors. This report analyzes the impact of these developments in the federal government sector.

Federal Telecommunications Market
This report explores the complex, multifaceted role of telecommunications and network services in the federal market. This report addresses progress and problems of FTS 2000, effects of dramatically advancing technology, and potential for security problems as agencies migrate to more open systems.

Federal Computer Equipment Market
Analyzes the market for supercomputers, large-scale and midrange computers, microcomputers, and workstations. Examines the effects of downsizing applications on equipment segments.

Federal Computer Security Market
This project investigates the volatile computer security environment, addressing continuing funding programs, jurisdictional disputes between NIST and NSA, the status of security training, and trends in vulnerability of federal computer systems.

Federal Network Management Market
Sizes the growing market for network management products and services. Discusses the role of the federal network manager influencing this market, as well as agency WAN and LAN environments and the greater functionality being offered by vendors.

Federal Systems Integration Market
Examines this important, profitable market, providing new agency surveys, case studies, and vendor profiles. The continuing "Grand Design" controversy is addressed from both agency and vendor views. Agency requirements for comprehensive, integrated solutions are identified.

Federal Information Systems and Services Market
This report provides an overview of the most recent federal information technology budget components, compares them to major information systems and services acquisition plans, and predicts the five-year growth of the primary service delivery modes and equipment.

Federal Information Technology Market Program

FEDERAL MARKET REPORT DESCRIPTIONS *(Continued)*

Federal Geographic Information Systems Market
Examines the growing popularity of GIS in the federal market. Discusses the leading applications and agency users, as well as leading vendors, and gives sizing and forecasting for this market.

Federal Electronic Data Interchange Market
Examines the current inventory of software and networks and future plans of agencies concerning EDI applications. Near-term and future programs encompassing EDI technology are described.

Federal Software Products and Related Services Market
Describes and forecasts the growing federal market for software, including Ada. Discusses agency buying trends and technology interests, and identifies leading vendors in the various segments.

Federal Electronic Imaging Market
Assesses the growing role this technology will play in reducing federal administrative costs and document handling. Identifies leading federal applications, agencies, and vendors.

Federal Professional Services Market
Examines the market and driving forces for consulting, design, custom programming, education, training and analysis in professional services. Provides a forecast and identifies leading agencies.

AGENCY AND ISSUE REPORT DESCRIPTIONS

Opportunities in Downsizing in the Federal Information Systems Market
This report analyzes the potential impact of each of the several forms of downsizing on federal market size and growth. The nature of downsizing projects is examined in terms of size and scope to meet user requirements.

High-Performance Computing in the Federal Market
Investigates the roles of supercomputers, minisupercomputers, and new massively parallel computer architectures in the federal market. Discusses the role of high-speed IT networks and examines the effects of the recently passed High-Performance Computing Act.

Federal Information Technology Market Program

AGENCY and ISSUE REPORT DESCRIPTIONS *(Continued)*

DISA Information Services
Examines the expanding role of DISA in fostering connectivity and interoperability of DoD IT, in light of application consolidation initiatives. Also investigates DISA's function in acquiring FTS 2000 services.

IT Buying Trends: DoD/NASA/Civilian Agencies
This report identifies the consolidated information technology budgets, requirements and buying trends of the three major federal agency categories. The potential direction as well as disparities between the three groups are also discussed.

Federal CIM Information Services Market
Analyzes the organization, plans, trends, and likely program funding of this key Defense Management Initiative. This project assesses CIM's effects on a wide range of DoD initiatives for greater efficiency, streamlining of functions and improved information management.

Agency Recompete Practices in SETA and Systems Operations Contracts
Agency practices in the recompetition of systems engineering/technical assistance (SETA) and systems operations contracts are analyzed. The factors involved in unseating an incumbent vendor are discussed.

Agency Pricing Practices in Professional Services Contracts
Identifies the billing rate practices for professional services of the major federal agencies. The forces driving these practices are analyzed, with emphasis on what agencies are buying with higher rates.

Federal Market Briefs **(contained in a single binder)**

Uncompensated Overtime
Addresses the controversial practices of some professional services firms to bid more than 40 hours of work at a weekly rate, thus lowering hourly rates.

Federal 8(a) Program
Discusses the new rules relating to minority- and woman-owned businesses.

Federal Anti-Drug Program
Identifies and analyzes the IT activities relating to federal drug interdiction and drug-abuse prevention programs, both overall and by participating agencies.

GSA Schedule Practices
Analyzes new GSA policies on dealers, schedules, cost and pricing data, as well as providing business volumes in various schedule categories.

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Strategic Questions for Customer Services Vendors...

- How are advanced technologies changing service offerings?
- What are the trends in marketing bundled or unbundled services?
- Is there a trend toward strategic alliances of vendors to offer single-point-of-contact service?
- How are vendors marketing and repackaging services in today's competitive environment?

Strategic answers provided by INPUT

INPUT offers three reports that can change the way your firm offers customer services.

In todays' tough, highly competitive market, you have to be creative and targeted in your customer services offerings. INPUT has studied the market and interviewed vendors and users, and offers the information you need to plan your strategy, maximize your revenues, and increase your profits. Today's hottest industry topics are addressed in depth, giving you the detailed information necessary to make well-informed decisions.

Act today.
Get the information you need.
Plan your future strategies backed by the knowledge of market experts.
Order INPUT's three reports today!

Order Now

Any single report is offered at $695, or take advantage of all three reports for a special price of $1,495. Need more information? Call Mark Drisko at (415) 961-3300; or fax us the enclosed reply sheet.

INPUT REPORT 1:

The Impact of New Support Technologies

Advanced technology is being quickly assimilated into the operations of many customer services vendors. Though new technologies were once reserved for only the "pioneers" in the industry, all customer services vendors must now assess the impact of such new support technologies as...

- **Artificial intelligence/expert systems**
- **Remote diagnostics**
- **Mobile communications**

INPUT's research study, based on interviews with 30 users and 20 vendors of customer service offerings, can help vendors better assess the real impact of these technologies, the potential profits, and the downside risk. This report answers such questions as...

- What technologies are available, and which ones are being actively implemented?
- Are vendors introducing offerings today considered just another "me too"?
- What are the implications of these technologies for customer service organizations? How can they be most effectively integrated?

BENEFITS

- Know which new technologies are available
- Plan your investments knowing the benefits...and the risks
- Find out what your competitors are doing

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Name _____

Title _____

Company _____

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City _____

State _____ Zip _____

Phone _____ Fax _____

INPUT provides clients with objective analysis and insightful opinions on customer services strategies.

ORDERS

About INPUT's reports

Please send me the report checked for $695.

- ☐ *The Impact of New Support Technologies*
- ☐ *Innovative Customer Service Offerings*
- ☐ *Single Point of Contact Customer Services*

☐ ***Please send me all three at the special price of $1,495***

California Clients: Please add applicable sales tax on 70% of the purchase price.

- ☐ Purchase order number _____
- ☐ Check enclosed
- ☐ American Express card # _____ exp. _____

Signature _____

☐ Please bill me ☐ Please bill my company

INFORMATION ONLY

- ☐ *I'd like to see more. Please send me the Report Abstracts and Tables of Contents.*
- ☐ *I have questions. Please have the author contact me.*

About INPUT's services...

Please keep me informed of other studies on...

☐ Outsourcing ☐ Systems Integration ☐ Downsizing ☐ IS Market Forecasts

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Keep us informed...

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INPUT REPORT 2:

Innovative Customer Service Offerings

Customer service vendors are caught in a market characterized by slow growth, intense competition and ever-shrinking margins. Do vendors that provide innovative service offerings—who are clearly differentiated from their competitors—have the greatest opportunity for success? Or do users see through repackaging and new pricing concepts in spite of their creativity? INPUT's study looks at this issue in depth, and assists customer service vendors to deliver offerings targeted at today's cost-conscious and market-savvy buyer. This report answers many questions about the "innovative customer service offerings" available today, including...

- What are the trends in offering bundled/unbundled services?
- What extended/nontraditional customer service offerings have the greatest potential for success?
- How receptive are customers to innovative service offerings?
- How are vendors creatively packaging their offerings today?

BENEFITS

- Gain insights into creative marketing ideas for customer service offerings
- Learn from the experience of other vendors before developing your own strategies
- Understand the benefits of the extended offering approach

INPUT REPORT 3:

Single Point of Contact Customer Services

A number of vendors have recently taken customer service to its fullest extent, offering to be the "single point of contact" vendor for all hardware, software and professional services in a multivendor environment. Is this a dominant future trend? How realistic is it for a single vendor to provide such comprehensive service? Are end users attracted to this approach, or do they see it as an impossible dream? INPUT answers these questions and others, such as...

- Is the "single point of contact" approach being sold in today's marketplace?
- Does the end user perceive real benefits?
- What is the impact on service quality?

BENEFITS

Before your organization rushes into this complex approach to marketing customer services...

- Learn the benefits and risks
- Assess whether your organization is ready to develop timely strategic alliances with other customer service vendors
- Know what users think of these approaches... and what they're willing to pay for

Call, fax, or mail your order to your nearest INPUT office

About INPUT

INPUT is a worldwide consulting and market research firm uniquely focused on the information technology services and software markets. Executives in many technically advanced companies in North America, Europe, and Japan rely on INPUT for data, objective analysis, and insightful opinions to support their business plans, market assessments, and technology directions. By leveraging INPUT's considerable knowledge and expertise, clients make informed decisions more quickly, and benefit by saving on the cost of internal research.

Since 1974, INPUT has compiled the most extensive research base available on the worldwide information services market and its key segments, providing detailed market forecasts, vertical industry sector analysis and forecasts and analysis of vendor strategies and products. INPUT delivers specific expertise in the fast changing areas of outsourcing, systems integration, EDI/electronic commerce, software development/CASE, and on the impact of downsizing.

Consulting services are provided by more than 50 professionals in major international business centers. Clients retain INPUT for custom consulting/ proprietary research, subscription-based continuous advisory programs, merger/ acquisition analysis and detailed studies of U.S. federal government IT procurements.

Most clients have retained INPUT continuously for a number of years, providing testimony to INPUT's consistent delivery of high-value solutions to complex business problems. To find out how your company can leverage INPUT's market knowledge and experience to gain a competitive edge, call us today.

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Kanda Sakuma-cho, Chiyoda-ku
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FITPP

FEDERAL PROGRAM FEE SCHEDULE

Effective 12/1/92

INPUT®

Don't miss a single sales opportunity! Know where your competition is! Benefit by having the most complete, comprehensive data bases on IT procurements in the federal government at your fingertips!

FEDERAL DATA BASES	INPUT Data Base	Single PC	LAN Stations 2-10	LAN Stations 11+
	FAIT™ (1) — Federal Awards of Information Technology	$15,000	$17,500	$20,000
	PARs— Procurement Analysis Reports	$15,000	$17,500	$20,000
	FAIT (1) **+ PARs**—	$17,500	$20,000	$22,500

(1) *Clients requiring external hard drive from INPUT add $600.*

INPUT expands the business development organizations of its clients by complementing these data base services with comprehensive information on federal IT market trends and access to a team of analysts to answer specific client questions. All services listed below are included in the data base fee schedule.

UNLIMITED HOTLINE — INPUT's team of analysts are a phone call away ... ready to answer specific questions you have about market issues, specific contracts, competition, vendors, etc. This service is unlimited to all clients.

RESEARCH BULLETINS — Published twice monthly, these newsletters keep busy executives up to date on market developments that can impact their sales strategies and marketing plans.

RESEARCH LIBRARY — INPUT's federal market research library in Vienna, Virginia, provides a wealth of information and data at the client's disposal.

ANNUAL FEDERAL CONFERENCE — INPUT offers the most authoritative review in the industry of the federal market each year: the size, growth rates of key segments, and identification of major IT trends. INPUT clients use this forum to build their strategic plans around the advice of the best and most informed analysts in the industry.

QUARTERLY BREAKFASTS — Clients of INPUT's services network each quarter at INPUT-hosted breakfasts, which include presentations on issues or trends key to federal IT vendors.

ADDITIONAL SITES — Clients with multiple physical sites may acquire INPUT's data base services for 50% of the original site fee.

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Name: _____

Title: _____

Authorized Signature: _____

Date: _____

Service Dates: From _____/ _____

To _____/ _____

Data Bases: _____

Configuration: _____

Annual Fee: $ _____

Special Terms: _____

The Client Organization will receive the services listed above, two invitations to the annual Federal Client Conference and the annual INPUT Executive Conference, and access to INPUT's Federal Information Center.

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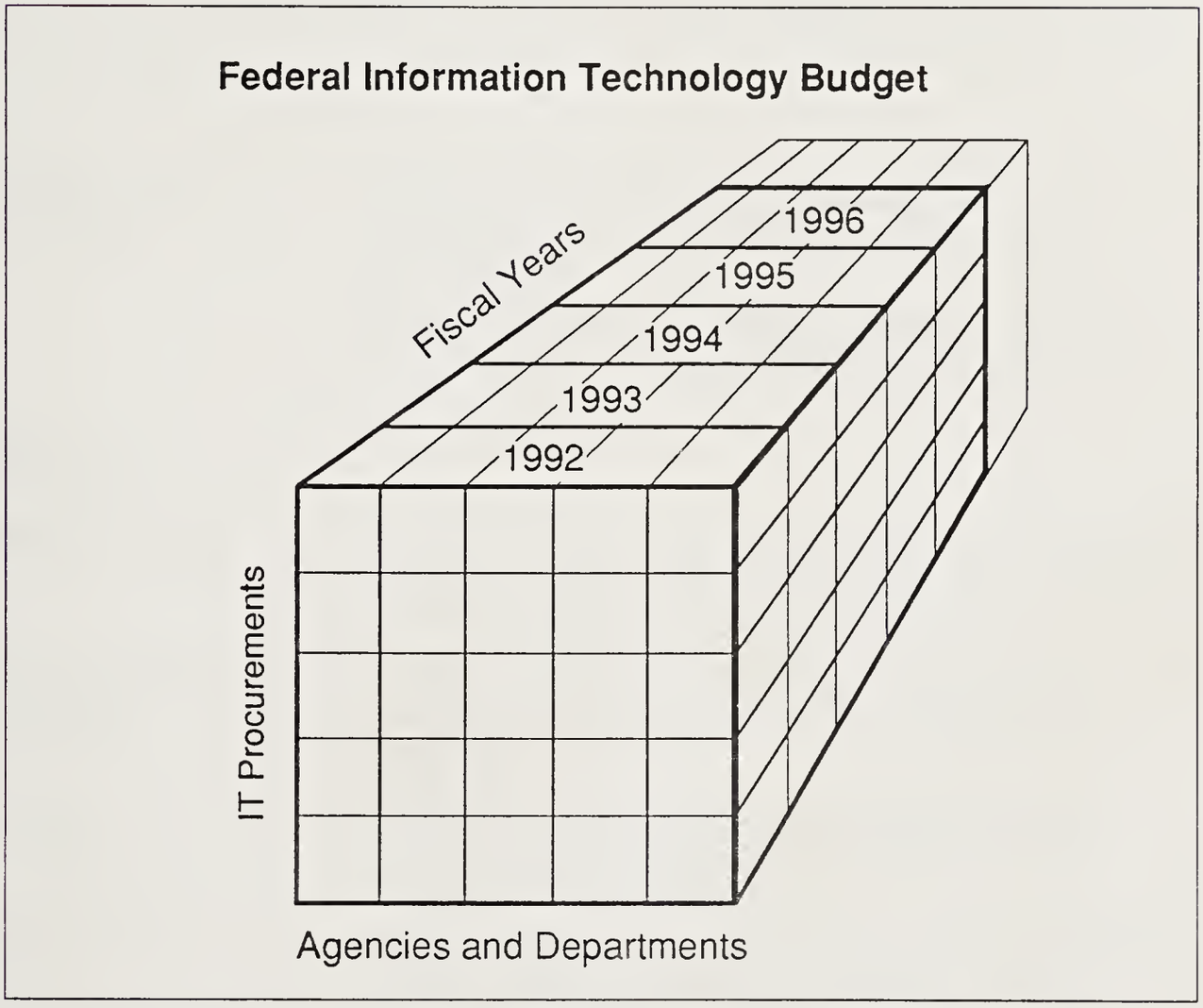
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Federal Information Technology Procurement Program



- **Identifies, describes, and tracks over $20 billion of planned information technology procurements by the federal government**
- **Supports client marketing activities relative to these procurements**

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Federal Information Technology Procurement Program

SUMMARY

Identifies, describes, and tracks over $20 billion of planned information technology (IT) procurements by the federal government. Supports client marketing activities relative to these procurements.

REPORTS AND DATA BASE	Program descriptions, analyses, and lead information on more than 400 active federal IT procurements. Descriptions of over 1,000 prospective and awarded procurements in a user-friendly PC data base.

SERVICES

Telephone Inquiry	Use the "hotline" to obtain answers to your immediate questions on federal IT procurements and trends, competitive data, government contacts, etc.
Access to INPUT Consultants	Continuous support availability relating to new developments affecting federal procurements and agencies.
Teaming	Identify potential bidding partners and suppliers, including 8(a) small business firms, for specific opportunities or services.
FOIA	Request agency documentation and contracts through INPUT while maintaining competitive security.
Federal Information Center	Access INPUT's Federal Information Center with hundreds of agency planning, budget, and procurement documents, government-related research sources, and other INPUT program reports.
Networking	Develop working relationships with complementary federal vendors through client conferences and INPUT staff.

INPUT®

Federal Information Technology Procurement Program

BACKGROUND and BENEFITS

Every year the federal government initiates thousands of procurement actions for information systems products and services. Most are for relatively small quantities, but there are still hundreds of larger ones. These procurement plans are constantly changing. The economic recession, federal budget limitation, defense downsizing, and a complex acquisition process create a difficult and challenging environment for vendors dealing with these procurements.

Identifying and tracking procurements is becoming a more arduous, expensive, and error-prone activity. Costs of bidding are increasing and competition is much tougher.

So planning, marketing, and sales staff need up-to-date intelligence and data on the real opportunities in this rapidly changing environment. They need to select and focus on these opportunities.

The **Federal Information Technology Procurement Program** (FITPP) builds on INPUT's nine years of analyzing the federal government's major automated information systems procurements. It details data not readily available in public documents.

Opportunity Identification	Identify real procurement opportunities. Make informed decisions. Avoid wasted time and energy.
Outsourcing	Outsource the procurement data collection process to INPUT's FITPP to provide objective evaluation of opportunities. For smaller companies, the FITPP outsources the marketing department to support sales.
Teaming	Support teaming and competitive analysis activities during the bidding process.
Consulting Support	Build a professional support relationship with INPUT's consultants. Test marketing ideas, strategies and tactics. Obtain market and vendor insights.
Networking	Develop working relationships with complementary vendors through client conferences and INPUT staff.
Marketing	Promote your company's capabilities and interests through INPUT's client and contact network.

Federal Information Technology Procurement Program

PROGRAM DESCRIPTION

The FITPP Procurement Analysis Reports (PARs) describe the important information technology (IT) purchases planned by federal agencies over the next five years. They provide budget data, event schedules, descriptions and bidding information to guide selection and bidding decisions.

Through continuous research, this program filters the variety of government plans, initiatives, budgets, announcements, and conferences into meaningful information that can effectively load your bidding pipeline with high-potential opportunities. The information is organized by federal departments and agencies and identifies the desired systems and services under:

- **Processing Services**
- **Network Services**
- **Professional Services**
- **Software Products**
- **Computer Equipment**
- **Maintenance**
- **Systems Integration**
- **Systems Operations**
- **Turnkey Systems**
- **Office Information Systems**
- **Secure Systems**
- **Image Systems**
- **Telecommunications Systems and Services**

Research uncovers key agency contacts, potential bidders, related programs, program status, and contract awards to date. The program has two components:

a. Data base of over 1,000 active or awarded procurements, available in both written and diskette format, updated and released semi-monthly.

b. Continuing support of client marketing activities with a target response within 24 hours of the request.

RELATED INPUT PROGRAMS

Federal Information Technology Market Program provides a five-year forecast of the federal IT market, with detailed competitive and trend analyses of the market components.

Information Services Vendor Analysis Program provides profiles and capabilities analyses of information services vendors.

Custom Research and Consulting Services satisfy unique needs for federal market research, client satisfaction, competitive analysis, market penetration strategies, proposal preparation strategies, acquisition support, and other tasks based on INPUT's extensive experience and information resources.

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Federal Information Technology Procurement Program

CLIENT SUPPORT SERVICES

Clients gain maximum benefit from the industry research and consulting services available to them through the development of a strong, continuous relationship with INPUT staff. Through frequent contact and sharing of opinions and ideas, you receive a flexible response to changing areas of interest and focus. INPUT provides the following specific services in order to build a full relationship:

Telephone Inquiry Service	INPUT's top-rated service satisfies requirements for short-term research needs (less than two hours), and clarification/amplification of report and presentation data.
Consultant Access	Continuous support from INPUT's consultants and executives who are available to share opinions and reactions to events, and to discuss ideas and challenges.
Conference	Senior agency officials and INPUT clients meet for a candid exchange of ideas on federal IT issues. Clients network with their counterparts and agency personnel.
Breakfasts	INPUT addresses the research results of a particular project and related issues several times a year.
Federal Information Center	Access agency planning, budget and procurement documents, on-line data bases and CD-ROM data resources, and related research sources.
Site Subscriptions	Complete program services to additional sites at substantially reduced fees.

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Federal Information Technology Procurement Program

REPORT DESCRIPTIONS

Procurement Analysis Reports (PARs) form a data base of information on over 400 active procurement programs. Updates and new descriptions of about 50 procurements are issued every two weeks.

Each PAR is about 2-6 pages in length. It is developed through primary research with federal agency officials and updated as new events occur. New PARs are generated as soon as partial information on a program is identified. Each PAR is formatted for rapid access to desired information in the following categories:

- Sponsoring agency, department, location
- Program name, acronym, status, funding, description
- Activity schedule - DPA, RFP, conference, proposal, award(s)
- IT components required, e.g., computers, professional services, etc.
- Key program and contracting contacts
- Background, function, acquisition plan

The PAR data base also includes information on more than 600 information technology contracts awarded over the past five years

FEDERAL INFORMATION CENTER

A wide range of information technology procurement materials is available for review at INPUT's Federal Information Center in Vienna, Virginia in four broad categories:

- Government Reference Documents - Five-year plans, budgets, manuals, regulations
- Federal Agency Documents - A-11 budgets, long-range plans, RFPs, 6AD reports
- Industry References - Directories, publications
- INPUT Publications - Conference proceedings, vendor descriptions, and reports

Federal Information Technology Procurement Program

TELEPHONE INQUIRY SERVICE

INPUT's "Hotline" Inquiry Service satisfies short-term research needs on PARs and related competitive data:

- Address customer-specific questions concerning programs
- Validate rumors or programs discovered with client's own marketing efforts
- Discover contractors bidding particular programs
- Identify potential teaming partners bidding specific programs
- Research competitors
- Research 8(a) companies
- Assist in developing business plans
- Identify key contacts with government agencies
- Detail agency budgets, policies, and regulations
- Perform topical literature search on agencies, issues
- Identify top contractors by agency or service
- Discover key awards by agency or contractor
- Report significant procurement changes
- Track related congressional hearings on programs

FOIA SERVICE

This INPUT service handles client FOIA requests for a nominal fee, plus copy fees charged by the government agency. Typical requests include winning proposals, award fee evaluations, contracts, bidder lists, and contract modifications. Advantage to client of INPUT requesting the information is legal concealment of client's interest in the contract or new procurement or incumbent.

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Federal Information Technology Procurement Program

Please enter my order as described:

Subscription to INPUT's Federal Information Technology Procurement Program at the fee of $15,000.

☐ Include the Automated Procurement Analysis Reports at the additional fee of $2,000

Travel expenses for on-site presentations are additional and will be billed separately.
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What Every Systems Integrator Needs To Know About the Federal Market

- ✯ How are vendors selected?
- ✯ Where are the growth markets in systems integration?
- ✯ Who are the dominant competitors?
- ✯ Where are the SI opportunities right now?
- ✯ Which agencies are most active in systems integration?

INPUT Gives You Hard Data and Insightful Market Analysis In One Targeted Report on Federal Systems Integration!

INPUT offers federal systems integrators a tremendous advantage in a market where cost and productivity pressures are making competition ruthless.

INPUT has just published a single-volume analysis of the *Federal Systems Integration Market, 1991-1996*, a study you can use as a competitive weapon to focus your marketing and product development efforts on projects where you get the highest possible return.

This comprehensive study offers you hard market data on federal systems integration, of course. But it also offers you a benefit no other research and consulting firm can provide: the analysis of INPUT's senior consultants, professionals who have spent their entire careers charting the intricacies of the federal market.

They have watched federal systems integration grow from nothing to a multibillion-dollar industry, and they know the facts and forces in this market that affect your success.

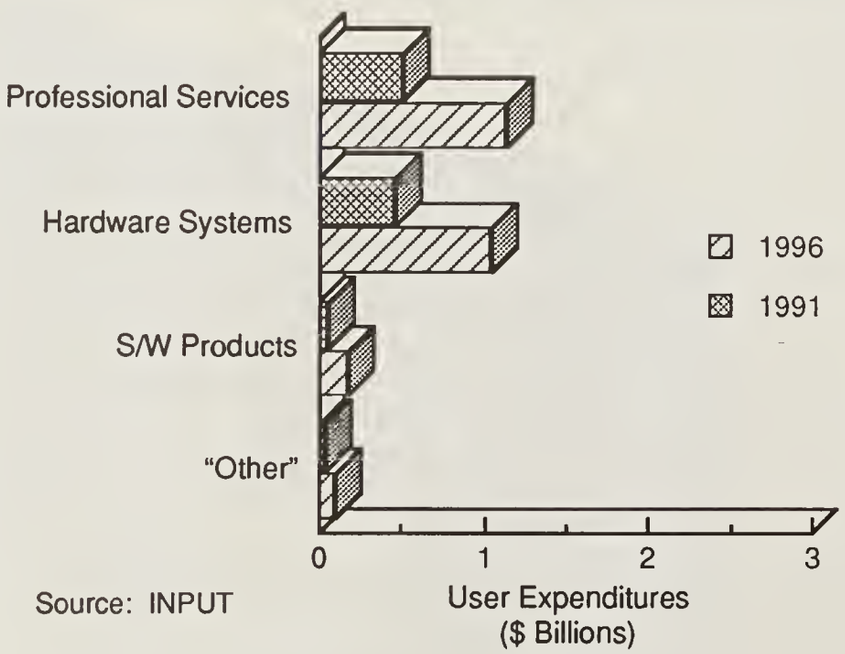
Pinpoint Market Trends

Some of the most important questions you have concern how the large trends in the federal market will affect your business. INPUT dedicates considerable resources to giving you information on:

- How large the market is, and how fast it is growing.
- Which civilian segments should yield the greatest opportunities in the five-year horizon.
- What the size of the opportunity is in the defense sector, and which agencies require the most systems integration assistance.
- How big the market is for systems integration by 11 different types of applications.
- Where the significant weaknesses are in federal information processing.
- How Grand Designs are regarded among agency buyers these days, and which 10 issue-areas affect them the most.
- Who the top 10 SI vendors are, and what their SI strategies are in the federal market.

The report also includes information on alternative strategies, nontechnical factors influencing the success of SI contracts, how other vendors approach federal SI, and more.

Defense Systems Integration Market Segments



Source: INPUT

INPUT GIVES YOU MORE than just numbers on defense and civilian systems integration markets. The report goes into considerable detail to break those markets into segments based on a number of criteria. This exhibit shows information on delivery modes.

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Better Penetration

In addition to information on these broader trends, however, INPUT's report on the federal SI market gives you targeted, tactical intelligence you can use *today* to improve your penetration of this competitive market. This is the only report available that gives you this kind of intelligence on questions like:

- What are the 56 recent contract awards—by agency—that are likely to require systems integration?
- Who is the contractor? What is the size of the award?
- What is the number of active SI programs by agency, and what is the total funding of those programs?
- What kind of hardware do these programs require? What percentage of programs specify mainframes? Minis? Micros? Supercomputers?
- How do agencies acquire integration programs today? How would they prefer to acquire them tomorrow?
- What type of SI vendor do agencies prefer?
- How do agencies rank the selection criteria of risk containment, initial cost, technical solution, life-cycle cost, contract type, and project management in order of priority?
- How do they rank the vendor characteristics of service orientation, industry experience, support skills, cost/performance, and six other selection criteria?

Plus in-depth analyses of four federal SI awards that includes an exhaustive examination of: the vendor and subcontractors, and what their functions were; the type, amount, duration, and schedule of the contract itself; the project components, including hardware, software, and services; the kinds of development required; the operations and maintenance status; and the status of the project today.

No other report can offer you this combination—solid market numbers, and analysis backed by decades of experience in the federal market that can help you interpret what those numbers mean for your company.

Report Highlights
Market Analysis and Forecast
• Competition • Federal Market Issues
Agency Requirements
• Hardware Systems • System Applications • Case Studies of Systems Integration Contracts • Acquisition Plans and Preferences
Systems Integration Vendors
• Market Share - Corporate Profiles of Top Federal Systems Integrators (eg., IBM Corporation ,Electronic Data Systems, Science Applications International Corporation, Martin Marietta, Computer Sciences Corporation (CSC), Unisys, Boeing Computer Services (BCS), and more) • Characteristics of Vendor Respondents • Vendor Perceptions of Federal Systems Integration • Commercial versus Federal Systems Integration • Strategies for Success
Key Opportunities

In the federal systems integration market today, you need an edge. And that's exactly what INPUT's report on the *Federal Systems Integration Market, 1991-1996* gives you. It's a competitive weapon for today's market. It's the edge you need.

Use the enclosed form to order your copy today.

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About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

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Tokyo 101, Japan
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Federal Systems Integration Market, 1992-1997
Agency Questionnaire

Name: _____

Title: _____

Agency: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: (_____) _____-_____

Use the following categories of systems integration to respond to this study:

Equipment
- Information Systems
- Communications

Software Products
- Systems Software
- Applications Software

Professional Services
- Consulting
- Project Management
- Software Development
- Design/Integration
- Education/Training and Documentation
- Systems Operations and Maintenance

1. Does your organization currently use or plan to use the services of a systems integration (SI) contractor? *(check one)*

Yes _____
No _____ (end)
Don't Know _____ (please forward to the appropriate person in your organization)

2. Do you expect your organization's expenditures for SI to increase, decrease, or remain the same through FY1997. *(check one)*

Increase _____ Decrease _____ Remain the same _____

Why? _____

3. In your organization, what types of applications, if any, require SI support? *(Please check all that apply)*

Information Analysis	_____	Management	_____
Scientific/Engineering	_____	Graphics	_____
Office Automation	_____	Human Resources	_____
Logistics	_____	Project Management	_____
Artificial Intelligence	_____	Accounting	_____
Administration	_____	Other *(specify)*:	

4. What types of computer platforms are required for your SI projects? *(check all that apply)*

Mainframe/Supercomputer platform _____

Minicomputer/PC platform _____

Other *(specify)*: _____

5. How important are the following technologies to your SI projects? Please rate the criteria on a scale of 1-5, with 5=most important, and 1=not important at all.

	Circle One
Image systems	1 2 3 4 5
Multi-media	1 2 3 4 5
CALS	1 2 3 4 5
Geographic Information Systems	1 2 3 4 5
DBMS	1 2 3 4 5
Artificial Intelligence	1 2 3 4 5
LANS	1 2 3 4 5
UNIX	1 2 3 4 5
Other *(specify)*_____	1 2 3 4 5

6. What type of contractor does your organization prefer to use for SI projects? *(check all that apply)*

Professional Services	_____	Aerospace Division	_____
Hardware Manufacturer	_____	Other *(specify):*	
Communications Vendor	_____	_____	

7. How frequently does your organization use the following types of firms as a prime SI contractor. Please rate the frequency on a scale of 1-5, with 5 being the most frequent.

	Circle One	Why?
8(a)/SDB/SB or Woman-owned	1 2 3 4 5	_____
Small but not 8(a)	1 2 3 4 5	_____
Mid-sized	1 2 3 4 5	_____
Large	1 2 3 4 5	_____
Not for profit	1 2 3 4 5	_____

8. On a scale of 1 to 5, with 5 being the most important, please rate the importance of the following criteria when selecting potential SI vendors.

	Circle One
Breadth of technical ability	1 2 3 4 5
SI experience	1 2 3 4 5
Network experience	1 2 3 4 5
Project management skills	1 2 3 4 5
Hardware/software offered	1 2 3 4 5
Multiple product lines supported	1 2 3 4 5
Alliances with other vendors	1 2 3 4 5
Price for services/cost	1 2 3 4 5
Vendor size/revenue	1 2 3 4 5
Reputation	1 2 3 4 5
Vendor financial condition	1 2 3 4 5
Service orientation	1 2 3 4 5
Other *(specify)*:_____	1 2 3 4 5

9. Please rate the importance of the following criteria when evaluating a vendor's proposal on an SI program. Please rate the importance on a scale of 1-5, with 5 being the most important.

	Circle One
Proposed technical solution	1 2 3 4 5
Life cycle cost	1 2 3 4 5
Initial cost	1 2 3 4 5
Risk containment measures	1 2 3 4 5
Contract type to be used	1 2 3 4 5
Project management skills	1 2 3 4 5
Other *(specify)*:_____	1 2 3 4 5

10. What suggestions would you offer SI vendors to improve their product and service offerings to the federal government?

11. Please indicate your preferred method of system acquisition for SI. *(check one)*

Buy hardware and manage integration in-house with external vendors _____

Buy integrated system through SI contractor _____

Buy hardware and use integration contractor _____

Other *(specify)* _____

12. On a scale of 1 to 5, with 5 being the most important, rate the importance of the following trends on your organization's use of SI vendors.

	Circle One	Why?
Downsizing	1 2 3 4 5	_____
Re-engineering	1 2 3 4 5	_____
Standards compliance	1 2 3 4 5	_____
Open systems	1 2 3 4 5	_____
Computer security	1 2 3 4 5	_____

13. How are the Corporate Information Management (CIM) initiative or other federal IT consolidation efforts impacting your organization's use of SI contracts?

You will receive a copy of the Executive Overview from this report once the report has been completed.

Thank You for Your Assistance

Federal Systems Integration Market, 1992-1997
Vendor Questionnaire

Name: _____

Title: _____

Company: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: (_____) _____-_____

Use the following systems integration categories to respond to this study:

Equipment
- Information Systems
- Communications

Software Products
- Systems Software
- Applications Software

Professional Services
- Consulting
- Project Management
- Software Development
- Design/Integration
- Education/Training and Documentation
- Systems Operations and Maintenance

1. Do you consider your company to be a systems integration (SI) vendor in the federal market? *(check one)*

Yes _____
No _____ (end)
Don't Know _____ (please forward to the appropriate person in your company)

2. How long has your company been in the federal SI business?

3. What are some of the factors that have influenced your company's entrance/participation in the federal SI market?

4. As a SI vendor, what functions does your company normally subcontract to other vendors?

5. What tactics do you use as a prime to effectively manage subcontractors?

6. How frequently does your company team with the following firms. Please rate the frequency on a scale of 1-5, with 5 being the most frequent.

	Circle one					Why?
8(a)/SDB/SB or Woman-owned	1	2	3	4	5	_____
Small but not 8(a)	1	2	3	4	5	_____
Mid-sized	1	2	3	4	5	_____
Large	1	2	3	4	5	_____
Not for profit	1	2	3	4	5	_____

7. Could you estimate your company's federal SI business for FY91 in the following categories? *(your responses should add up to 100%)*

SI Category	Indicate Percent
Software Development	_____
Equipment	_____
Software Products	_____
Design/Integration	_____
Professional Services	_____
Education/Training and Documentation	_____
Operation and Maintenance	_____
Systems Operations	_____
Other Products/Services	_____

8a. Please estimate the following FY91 revenue figures for your company.

Total company's FY91 revenue _____

Federal SI revenue _____

8b. What portion of your FY91 federal SI revenue was subcontracted out?

9a. What types of procurements offer the most potential to your company in the federal SI market? *(check all that apply)*

Sole Source Jobs ____ Basic Ordering Agreements ____

Competitive Niche Jobs ____ Major SI Opportunities ____

IDIQ Requirements Contracts ____

Other *(specify)*_____

9b. For each type that you marked above, please list why it offers the most potential.

10. Indicate below how your company views SI opportunities by agency type. *(check one for each agency)*

Agency Type	Opportunities: Increasing	Decreasing	Remaining the same	Why?
DoD	_____	_____	_____	_____
Civil	_____	_____	_____	_____

11. Please name the specific federal agencies that offer the best SI opportunities for your company.

12. Please rate the growth of the following technologies in the federal SI market? Please use a scale of 1 to 5 with 5 = growing the fastest and 1 = not growing at all.

	Circle one					Why?
Image Systems	1	2	3	4	5	_____
UNIX	1	2	3	4	5	_____
CALS	1	2	3	4	5	_____
GIS	1	2	3	4	5	_____
DBMS	1	2	3	4	5	_____
LANS	1	2	3	4	5	_____
Multi-media	1	2	3	4	5	_____
Artificial Intelligence	1	2	3	4	5	_____

Other *(please specify)*_____

13. On a scale of 1-5, with 5 being the most important, rate the importance of the following trends on your company's SI business.

	Circle one	Why?
Downsizing	1 2 3 4 5	_____
Re-engineering	1 2 3 4 5	_____
Standards compliance	1 2 3 4 5	_____
Open systems	1 2 3 4 5	_____
Computer security	1 2 3 4 5	_____

14. In your opinion, what successful strategies do you see your competitors using in the federal SI market?

15. How do you see the roles of the following types of vendors changing over the next 5 years?

Hardware vendors (PC, Mini, & Mainframe) _____

Professional Services vendors _____

Software vendors _____

16. How are the Corporate Information Management (CIM) initiative or other federal IT consolidation efforts impacting your federal SI efforts?

17. In your opinion, what federal applications could be leveraged into the commercial SI market?

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- What strategies work best for a niche player?

The continuing awards of communications and network services contracts to other than FTS 2000 prime vendors clearly signal a growing market. Recent protests and court decisions define the limitations of the current carrier contract.

INPUT's report, ***Federal Telecommunications Market, 1992-1997***, highlights key perspectives of this volatile market. It examines the varied facets of critical technology applications as they are expected to unfold over the next five years.

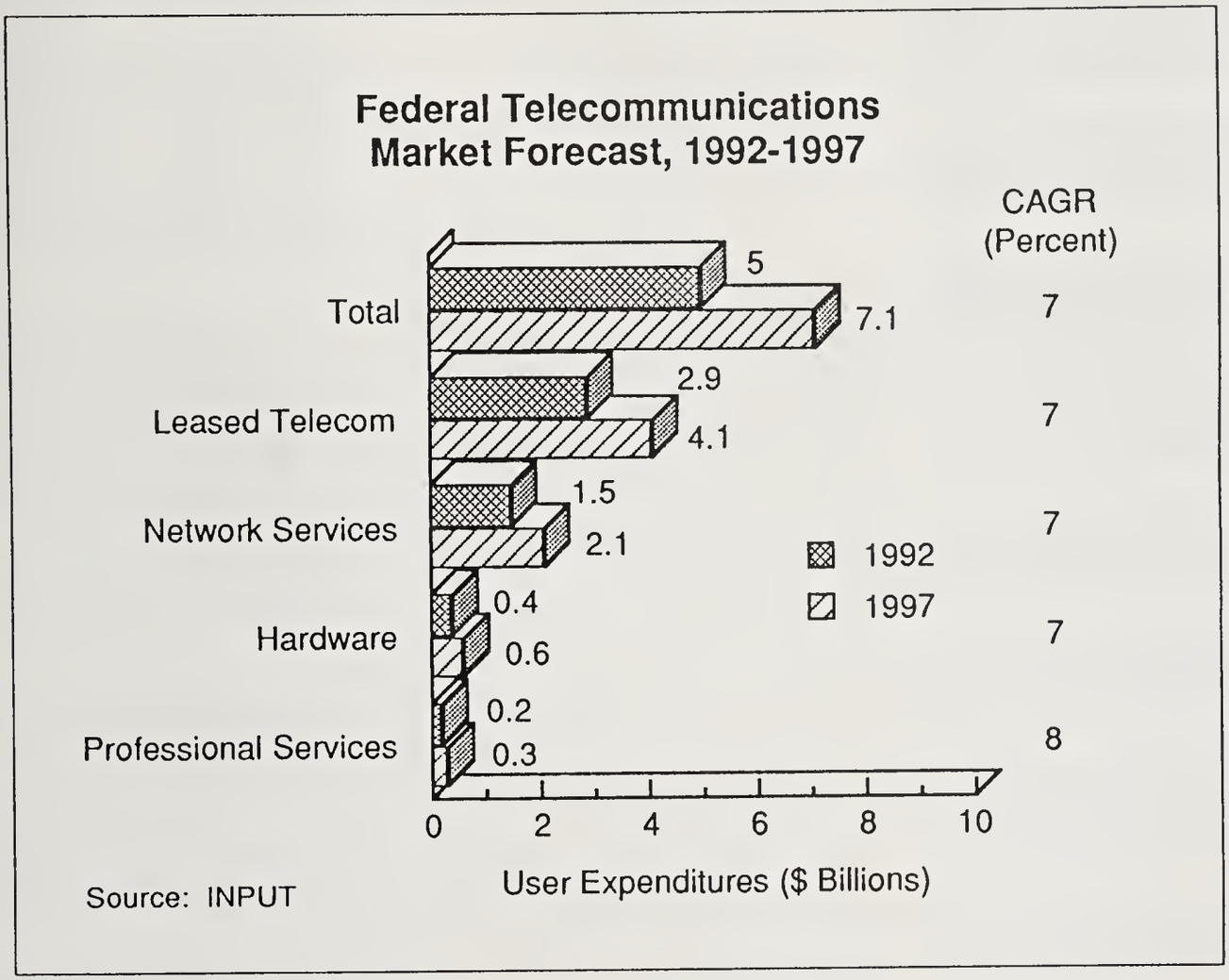
This study highlights the significant communications and network initiatives planned for the next five years. It emphasizes the need for new technologies in VSATs, cellular communications, E-Mail, and electronic commerce. It's based on interviews with government and vendor executives, agency long-range plans, budget requests, and a wide variety of other sources.

Learn from INPUT's discussion where non-FTS 2000 opportunities that require networks, equipment, and software and services will occur, to meet the federal government's expanding needs for information transfer.

MARKET ANALYSIS	FTS 2000	OPPORTUNITIES	COMPETITION
• Budgets	• Digital Conversion	• Key Agencies	• Leading Players
• Buying Trends	• Service Pressures	• Buying Preferences	• Current Services
• Market Forces	• Exemptions	• Initiatives	• Vendor Prospects
• Market Shares	• Services Scope	• New Technology	• Response Needs

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- Software Products
- Systems Operations
- Processing Services
- Network Services
- Professional Services
- Systems Integration
- Turnkey Systems
- Office Information Systems
- Maintenance Services
- Telecommunications Systems and Services

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- What do agencies look for in computer security suppliers?
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Federal Computer Security Market, 1992-1997

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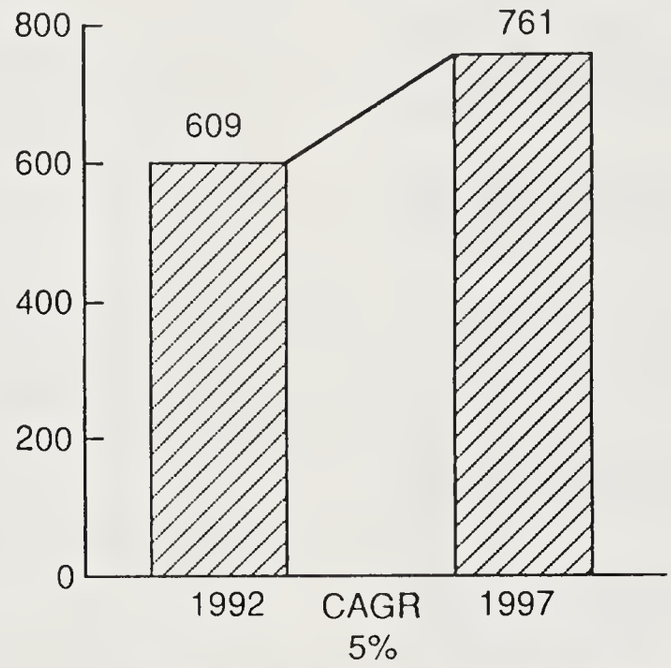
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- What are agencies' planned security acquisitions or implementations?
- What are the agencies' functional requirements for computer security?
- What performance criteria do agencies use to evaluate computer security products and services?
- What improvements would agencies like to see in vendor products and services?

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FY 1992 - FY 1997



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Policies, Regulations, and Standards
CIM-Related Documents and Information

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- **What CIM-sponsored procurements, if any, exist?**

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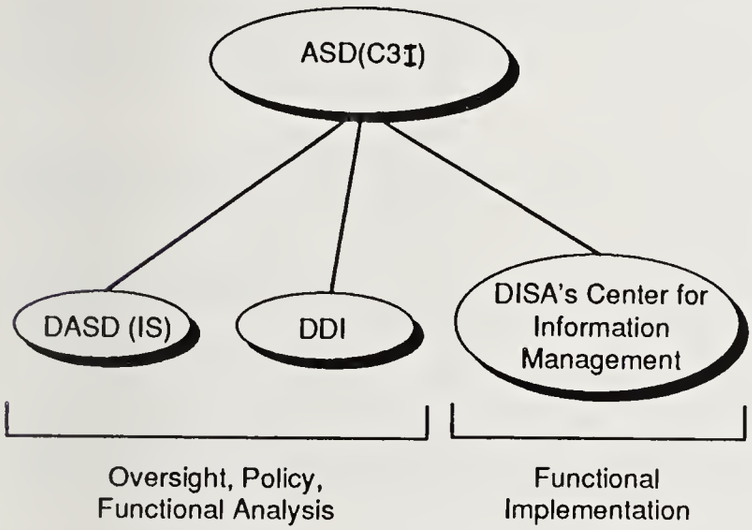
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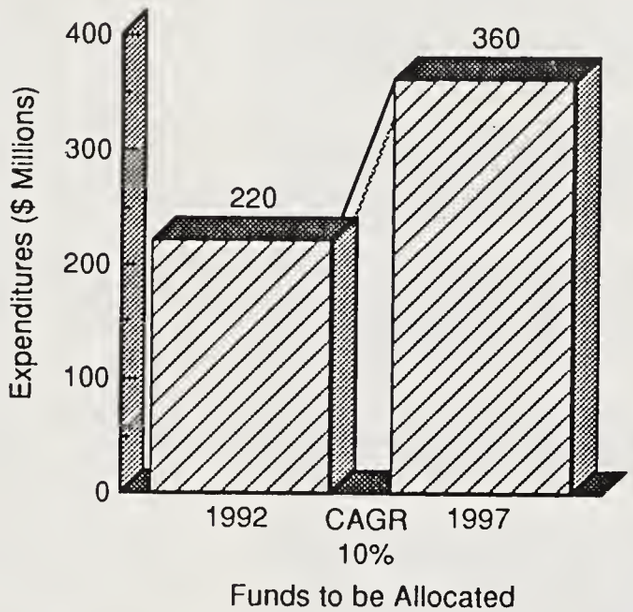
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FUNDS TO BE allocated under CIM.

INPUT's comprehensive report, *The Federal CIM Information Services Market,* provides the first "how to" CIM guide that will help vendors...

- **Understand CIM**—its history, mission, and goals. Learn what the major project milestones are, and where your company can participate.
- **Deploy your resources effectively**—go after the highest probability opportunity for your firm within the CIM structure. Don't waste valuable business development resources without a thorough understanding of the CIM initiative.
- **Maximize your return on investment**—set a strategy that positions your firm to beat your competition. Make sure your timing is right to enter this expanding market opportunity.

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INPUT is a worldwide consulting and market research firm uniquely focused on the information services and software markets within the information technology industry. Executives in many technically advanced companies in North America, Europe, and Japan, rely on INPUT for data, objective analysis, and insightful opinions to support their business plans, market assessments, and technology directions. By leveraging INPUT's considerable knowledge and expertise, clients make informed decisions more quickly, and benefit by saving on the cost of internal research.

Since 1974, INPUT has compiled the most extensive research base on the worldwide information services market and its key segments, providing detailed market forecasts, vertical industry sector analysis and forecasts and analysis of vendor strategies and products. INPUT delivers specific expertise in the fast changing areas of outsourcing, systems integration, EDI/electronic commerce, software development/CASE, and the impact of downsizing.

Consulting services are provided by more than 50 professionals in major international business centers. Clients retain INPUT for custom consulting/ proprietary research, subscription-based continuous advisory programs, merger/ acquisition analysis and detailed studies of U.S. federal government IT procurements.

Most clients have retained INPUT continuously for a number of years, providing testimony to INPUT's consistent delivery of high-value solutions to complex business problems. To find out how your company can leverage INPUT's market knowledge and experience to gain a competitive edge, call us today.

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INPUT®

Find Your Niche in the Federal High-Performance Computing Market

- Locate the hidden opportunities
- Identify funding available for acquisitions
- Discover the trends in this market
- Learn which agencies are buying
- Identify agency high-performance computing applications

Position Your Company to Compete in the Federal High-Performance Computing Market

If you are involved in high-performance computing, you'll want to know the answers to...

- What are the current and anticipated effects of the HPCC Act on the market?
- What funding is available for procuring high-performance computing equipment and services?
- On which agencies should vendors focus their marketing efforts?
- Who will participate in the National Research and Education Network?
- Who are the leading vendors?
- What strategies are required to succeed in this market?

INPUT has the answers you need to these and other questions!

The Bush Administration's High-Performance Computing and Communications (HPCC) Initiative is an indication of the necessity of continued U.S. technological advancement. This initiative aims to keep the U.S. ahead of Japan in the information technology industry and increase our nation's Gross National Product (GNP).

INPUT's report, *High-Performance Computing in the Federal Market, 1992-1997*, unravels the HPCC mystery. It will be your guide to identifying opportunities in this marketplace for your business.

This study IS...

An assessment of the federal market for high-performance computing and the identification of opportunities for federal vendors. This study is based on a series of interviews with agency officials that currently use high-performance computing systems, Federal agency FY 1992 information technology budgets and a wide variety of other sources.

Learn from experience...

Where are the procurement opportunities, who are the major competitors, what agencies will require high-performance computing services and equipment, and what major applications are dominating the market? Take advantage of this information to maximize the success of your company.

VENDOR INFORMATION
- Leading Players
- Current Products
- New Products

TECHNOLOGY
- Parallel Computing
- High Speed Networks
- Grand Challenge Applications
- Installed Base

FORECASTS
- Buying Trends
- Budgets
- Agency Involvement

MARKET ANALYSIS
- Agency Pressures
- Vendor Pressures

LEGISLATION
- Initiatives
- Goals
- Components
- Management

OPPORTUNITIES
- Key Agencies
- Funding Availability
- RFP Dates

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Dear Colleague:

Today's federal high-performance computing market is expanding at a healthy 15% and represents a wealth of opportunity! INPUT can help you understand the dynamics of this advancing technology and its marketplace.

As a federal information technology contractor, you need to know the structure of the federal high-performance computing market and:

- OPPORTUNITIES — What they are, where they are
- PROCUREMENT FUNDING — What's available within federal agencies for high-performance computing equipment and services
- HIGH-PERFORMANCE COMPUTING AND COMMUNICATIONS (HPCC) — How is this initiative affecting the market?

INPUT's report, *High-Performance Computing in the Federal Market* explains the HPCC initiative, identifies agency issues and discusses the leading high-performance computing vendors. We project how the market will change, discuss trends and identify where the opportunities are.

Don't miss out on the current and future high-performance computing opportunities.

Sincerely,

John E. Frank
Vice-President

P.S. This report is also available as part of INPUT's Federal Information Technology Market Program. Reports in this series contain valuable planning information for both vendors and users. For more information on this report or the program, please call me directly at (703) 847-6870.

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INPUT provides clients with objective analysis and insightful opinions on opportunities within the federal government marketplace.

ORDERS

About INPUT's report, High-Performance Computing in the Federal Market...

Please send me the report for $1,500 ($1,750 after October 15, 1992)— California Clients: Please add applicable sales tax on 70% of the purchase price.

- ☐ Purchase order number _____
- ☐ Check enclosed
- ☐ American Express card # _____ exp. _____

 Signature _____
- ☐ Please bill me ☐ Please bill my company

INFORMATION ONLY

- ☐ *I'd like to see more. Please send me the report abstract and table of contents.*
- ☐ *I have questions about how the conclusions pertain to my business. Please have the author contact me.*

Please keep me informed of future studies on...

☐ Outsourcing ☐ Systems Integration ☐ Downsizing ☐ IS Market Forecasts

☐ *Please send me information on INPUT's upcoming Outsourcing Conference in September.*

I'd like information on INPUT's Federal Market Studies in the...

☐ Federal Computer Security Market ☐ Federal Telecommunications Market

MAIL LIST

☐ *My responsibilities have changed. Please direct future information to:*

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Title _____ City _____

Company _____ State _____ Zip _____

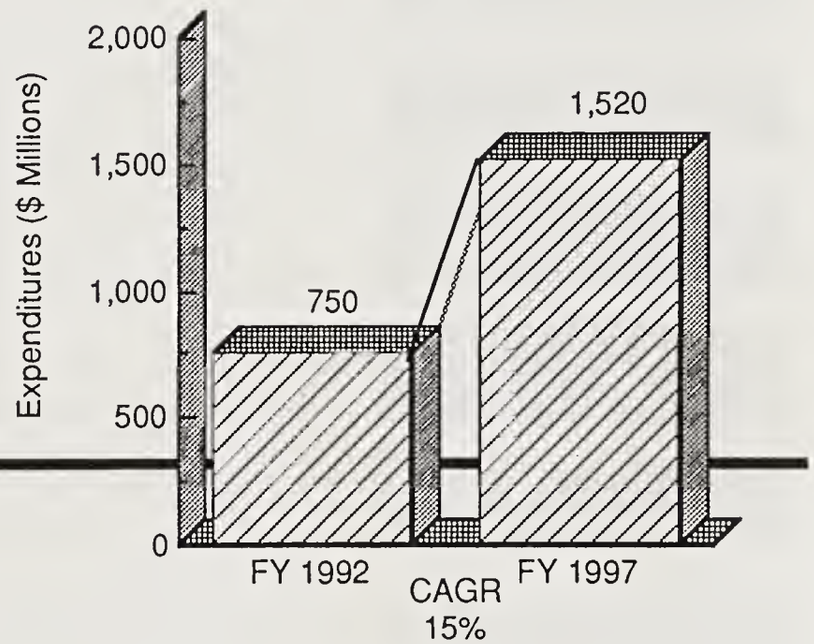
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INPUT®

High-Performance Computing Offers Tremendous Opportunities for Federal Contractors

INPUT's comprehensive report, *High-Performance Computing in the Federal Market,* provides the in-depth information and direction you need to win business in the federal high-performance computing market!

Federal High-Performance Computing Forecast



Issues Addressed

- Effects of the HPCC Act on the market
- Funding available for equipment and service purchases
- Agencies planning acquisitions
- Leading vendors
- Dominant applications
- Strategies required for market success

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1992 Federal Information Technology Conference

Federal IT Market: Prospects and Progress

- Discover how to maximize your effectiveness in the federal information technology market
- Hear the views of senior federal officials on upcoming agency needs
- Learn about market size and growth expectations—and how the new budget priorities are affecting federal spending

JUNE 1992

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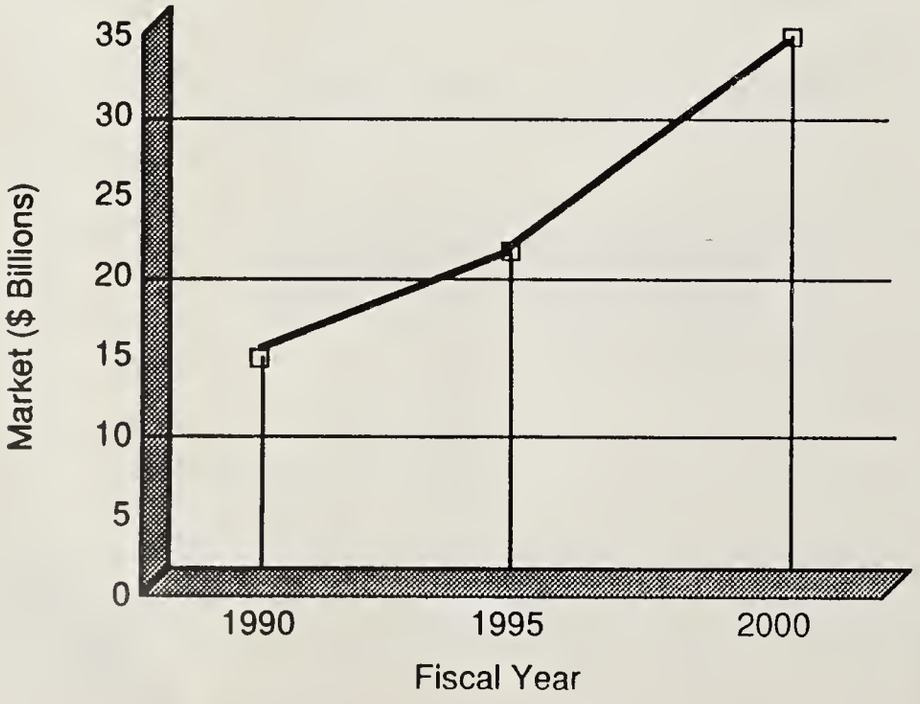
INPUT's 1992 Federal Information Technology Conference

Federal IT Market: Prospects and Progress

This is the time for reassessing your prospects in the federal marketplace over the next five years. There are a lot of changes taking place as DoD restructuring progresses and the still growing IT budget shifts to civilian agencies. New technologies promise to deliver more power and flexibility to the users through downsizing, outsourcing, and re-engineering.

As a vendor determined to take advantage of what is happening in the federal marketplace, you can benefit from the insight that agency representatives, vendor executives, and the INPUT research staff bring to this conference.

Federal Information Technology Market



THURSDAY—JUNE 11

- **Federal IT Market Forecast, 1992-1997**

 John Frank, Vice President, INPUT

- **The 8(a) Program from Both Sides (panel)**

 Charles Hall, President, PSI, Inc.

 IBM

- **High Performance Computing Potential**

 NIST

- **The CIM Initiative Continues**

 Dennis Brown, Director, CIM Operations Center, DoD—CIM

- **Downsizing in the Federal Market**

 Peter Cunningham, President, INPUT

- **Outsourcing Federal IT Requirements**

 NASA

- **Fast Track Procurement Can Work**

 TBA

FRIDAY—JUNE 12

- **DoD Software Reuse and Simplification Program**

 Dr. Kurt Fischer, Deputy Director, Information Technology, DoD—DDI

- **Federal Market Dialogue**

 J.P. Richard, Vice President, INPUT

- **Federal Procurement Regulations—Their Impact**

 Walt O'Neil, Special Assistant, Federal Policy, IBM

REGISTRATION FORM

INPUT

YES! Sign Me Up! I need to learn the latest about what's happening—and how to succeed—in the federal information services market. I will attend INPUT's 1992 Federal Information Technology Market Conference—*Federal IT Market: Prospects and Progress* June 11 & 12, 1992, Tyson's Corner Marriott, Vienna, Virginia.

☐ Yes, I am registering for this conference. There will be _____ attendees from my company. I understand that I will be billed $795 for each of the first 2 attendees and $295 for any attendees thereafter.

☐ Yes, I am registering for this conference. There will be _____ attendees from my company. I am a subscriber to INPUT's Federal Program and can send 2 attendees at no charge.

☐ Please have an INPUT representative call me.

Company _____

Name _____

Title _____

Address _____

City _____ State _____ Zip _____

Phone _____

Signature (required for all orders) _____

Cancellations must be received in writing and are subject to a $50 cancellation fee. There are no refunds for cancellations received after June 5, 1992. INPUT considers purchase order numbers, company checks, or American Express as proper reservations. Payment must be received prior to conference. INPUT reserves the right to make changes to this conference without notice.

HOTEL RESERVATIONS:
Call the Tyson's Corner Marriott, (703) 734-3200, and ask for the INPUT Conference rate.

TERMS OF PAYMENT—
Payment in full is due prior to conference.

☐ Enclosed is my check in the amount of $ _____ to cover the cost of my registration.

☐ Please invoice my company on purchase order number _____ in the amount of $ _____.

☐ Charge it to my American Express number:

exp. date _____/_____/_____

Don't miss these upcoming INPUT 1992 Conferences

SYSTEMS INTEGRATION PROGRAM CONFERENCE
Fairview Park Marriott, Falls Church, Virginia July 21 and 22

OUTSOURCING INFORMATION SYSTEMS PROGRAM CONFERENCE
(formerly Systems Operations Program)
Ritz-Carlton Hotel, McLean, Virginia September 17 and 18

1992 U.S. EXECUTIVE CONFERENCE
Fairmont Hotel, San Francisco, California October 4, 5, and 6

For more information, call Barbara Fisher, Conference Coordinator, at (703) 847-6870. If you are not a client, take advantage of an early registration discount of 10% by registering 30 days prior to the event.

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About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/ consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

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SETA and Systems Operations Recompetes: *Bid to Win!*

Find out how in INPUT's

AGENCY RECOMPETE PRACTICES IN SETA AND SYSTEMS OPERATIONS CONTRACTS

How often does *your* company win the recompetitions of SETA contracts incumbents?

As an incumbent SETA contractor, do you know what danger signs may unseat you in a recompetition?

It is clear that the federal market for SETA and systems operations services is dominated by incumbent contractors. According to INPUT's new study, incumbent contractors continue to win subsequent contracts in 75% of the cases.

When a contract is up for recompete, vendors still flock to unseat the incumbent. It is possible to reduce incumbent success rates and improve you own company's win ratios for these types of lucrative contracts.

As a successful SETA contractor, you need to know how to keep winning the recompetes as they come up, in spite of your competitions best efforts.

INPUT tells you how in *Agency Recompete Practices in SETA and Systems Operations Contracts.*

INPUT supplements the collected data with in-depth analysis and other market intelligence about upcoming procurements to help bidders beat incumbents.

Use this report to:

- Avoid becoming a "fall out" vendor as the competition for federal dollars intensifies.
- Improve your knowledge base of the SETA and systems operations contracts due for recompetition.
- Develop winning strategies and acquire more SETA and systems operations contracts.

Order *Agency Recompete Practices in SETA and Systems Operations Contracts* for your company today!

Strategies Against Incumbents

- Market aggressively to agencies
- Demonstrate ability to outperform incumbents
- Target changing scope/poorly performed contracts
- Develop and communicate mission understanding

INPUT®

Maximize your chances of winning recompetes!

Who Can Benefit from this Information?

Incumbent Vendors

- Test existing contracts for danger signs
- Find new opportunities to leverage your SETA experience
- Validate your current strategies

New Vendors

- Identify where incumbents may be vulnerable
- Learn what agencies are looking for in SETA contractors
- Locate the agencies with upcoming SETA procurements

In Agency Recompete Practices in SETA and Systems Operations Contracts *you can learn:*

- Why incumbents dominate the market
- What strategies work against an incumbent
- How to take advantage of an incumbent's mistakes at recompete time
- The market forecast for IT support contracts
- Which agencies have upcoming opportunities for SETA and systems operations recompetes

INPUT is the leading provider of data and analysis on the federal IT market. Use the enclosed fax response sheet to let us know of your interest in ...

- **INPUT's opportunity data bases ... load your pipeline with current leads!**
- **INPUT's market reports**

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Call us today to learn how your company can use INPUT's knowledge and experience to grow and profit in the revolutionary IT market of the 1990s.

Annual Subscription Programs

North American and European Programs

Analysis of Information Services, Software, and Systems Maintenance Markets
5-year Forecasts, Competitive and Trend Analysis

- 9 Categories of Software and Services
- 15 Vertical Markets
- 7 Cross-Industry Markets
- The Worldwide Market (30 countries)

U.S. Programs

- Systems Integration
- Outsourcing
- EDI and Electronic Commerce
- Downsizing Information Systems
- IT Vendor Analysis
- U.S. Federal Government IT Procurements

European Programs

- Systems Integration
- Outsourcing
- Network Management
- Downsizing Information Systems
- Customer Services

Custom Consulting

Many clients leverage INPUT's proprietary data and market knowledge by contracting for custom consulting projects to address specific questions about their market strategies, new product/service ideas, customer satisfaction levels, competitive positions and merger/acquisition options. Users have also been advised by INPUT on their downsizing plans and in assessing outsourcing vendors.

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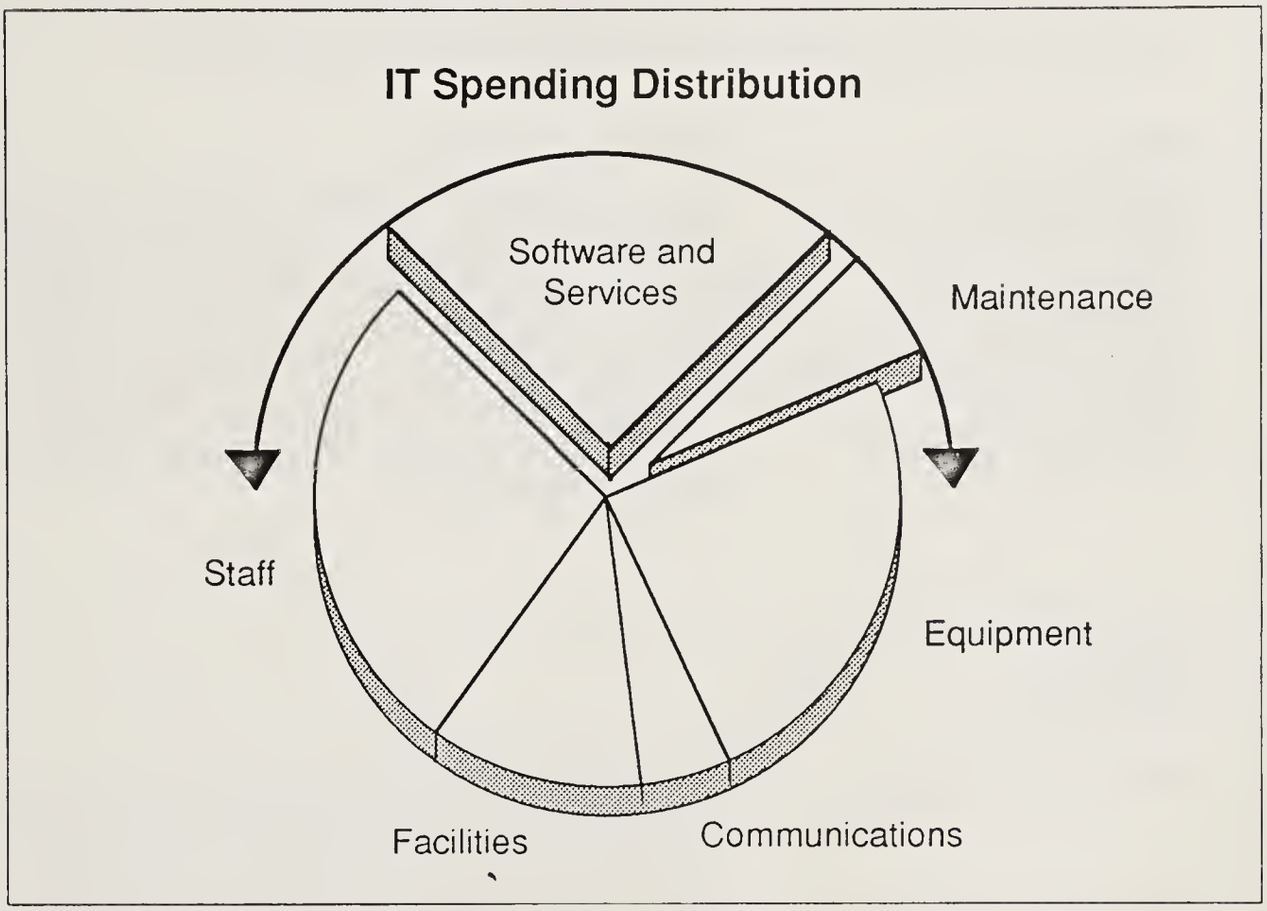
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U.S. Information Services Market Analysis Program



Analyzes the information services industry in the United States.

- Analysis of Customer Needs
- Market Size and Growth by
 - Industry
 - Cross-Industry
 - Product/Service
- Competitive Information
 - Leading Vendor Profiles
 - Market Positioning
 - Strategies
- Impacts of
 - Downsizing
 - Economy
 - Open Systems
 - Outsourcing
 - Networking
 - Re-engineering

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U.S. Information Services Market Analysis Program

Analyzes the information services industry in the United States.

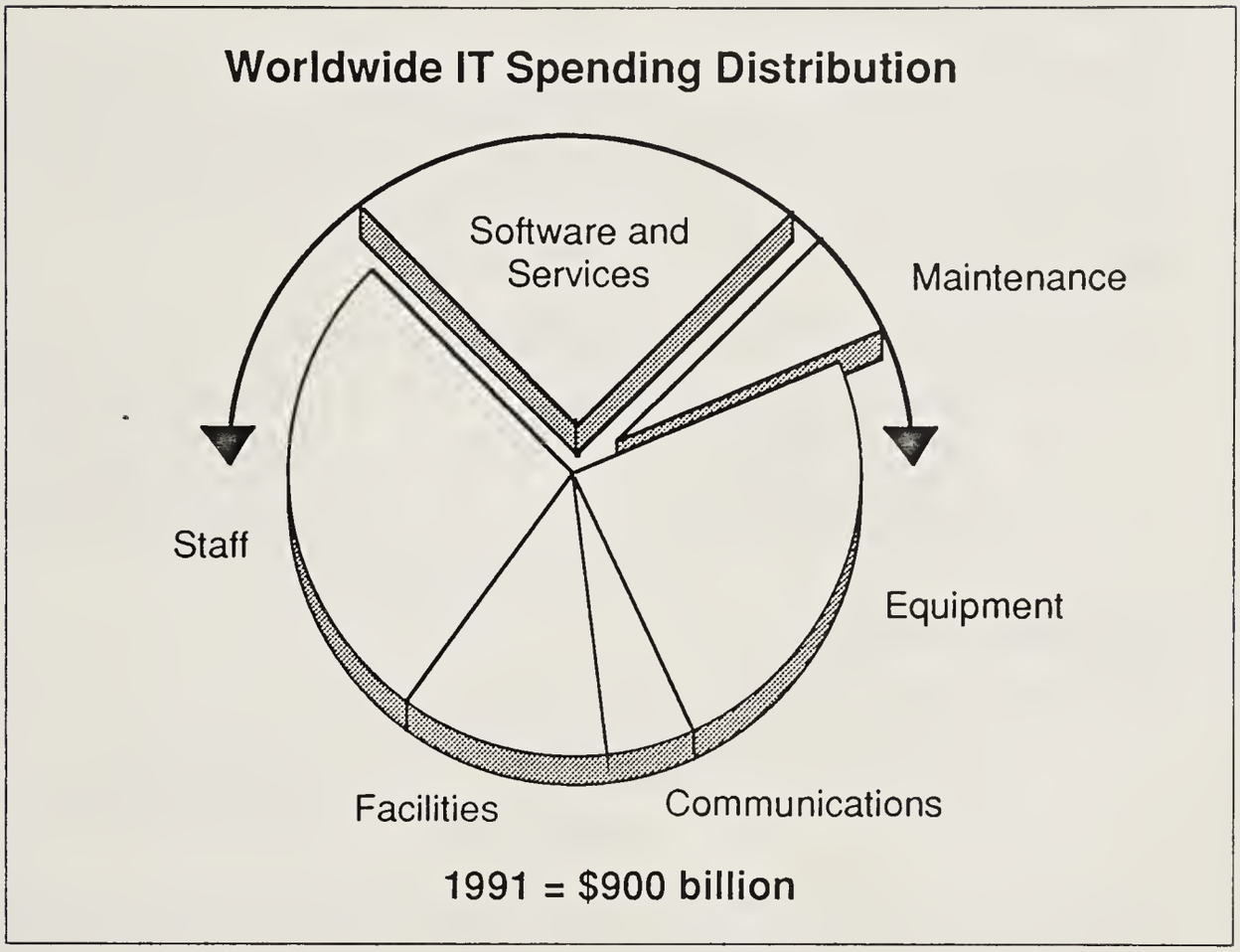
Issue Reports, Information Services Market Reports, Vertical and Cross-Industry Market Reports, and Research Bulletins	Analysis of trends, issues, competition, spending patterns and opportunities in the rapidly changing information services industry in the United States. Provides market analysis and five-year forecasts for 9 major market segments (delivery modes) and 22 subsegments (submodes) across 15 industry sectors and 7 cross-industry sectors—over 300 individual markets are projected annually.

BENEFITS

Know Your Market	The market is changing rapidly; in some cases discontinuously. This program enables you to keep on top of, and indeed to predict, such changes.
Competitive Strategy	Understand what new competitors and key vendors are doing in the market.
Emerging Market Identification	Build a strategy for success in emerging markets —for example, UNIX, client/server and open systems.
Consulting Support	Build a professional support relationship with INPUT's experienced consultants. Test marketing ideas, strategies and tactics. Obtain market and vendor insights.
Networking	Develop working relationships with complementary vendors through client conferences and INPUT staff.
Marketing	Promote your company's capabilities and interests through INPUT's worldwide client and contact network.
Proven Results	Rely on INPUT's 17 years of forecasting this market.

INPUT®

Worldwide Information Services Market Report



Forecasts the worldwide, regional and major country markets for:

- **Systems Software Products**
- **Applications Software Products**
- **Turnkey Systems**
- **Equipment Services**
- **Professional Services**
- **Systems Integration**
- **Systems Operations**
- **Processing Services**
- Network Services

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Worldwide Information Services Market Report

REPORT DESCRIPTION

The worldwide market for information services and software products exceeded $230 billion in 1991. It is becoming a global market with opportunities for growth outside local markets. INPUT's worldwide forecast of the information services and software products market provides the foundation to expand planning horizons.

Industry Structure

The entire industry is reviewed and forecasted for the 1992-1997 period for:

- Systems Software Products
- Applications Software Products
- Turnkey Systems
- Equipment Services
- Professional Services
- Systems Integration
- Systems Operations
- Processing Services
- Network Services

Geographic Coverage

The world is divided into five major regions:

- North America
- Europe
- Asia/Pacific
- Latin America
- Mideast/Africa

Thirty (30) individual countries or small groups of countries are covered, ranging from the United States, which represents 47% of the worldwide market, to Singapore, which represents less than 1% of the market.

Fourth Issue

The 1992-1997 issue is INPUT's fourth year of forecasting the worldwide information services market. It includes new primary research in all parts of the world and a full assessment of the market opportunities available.

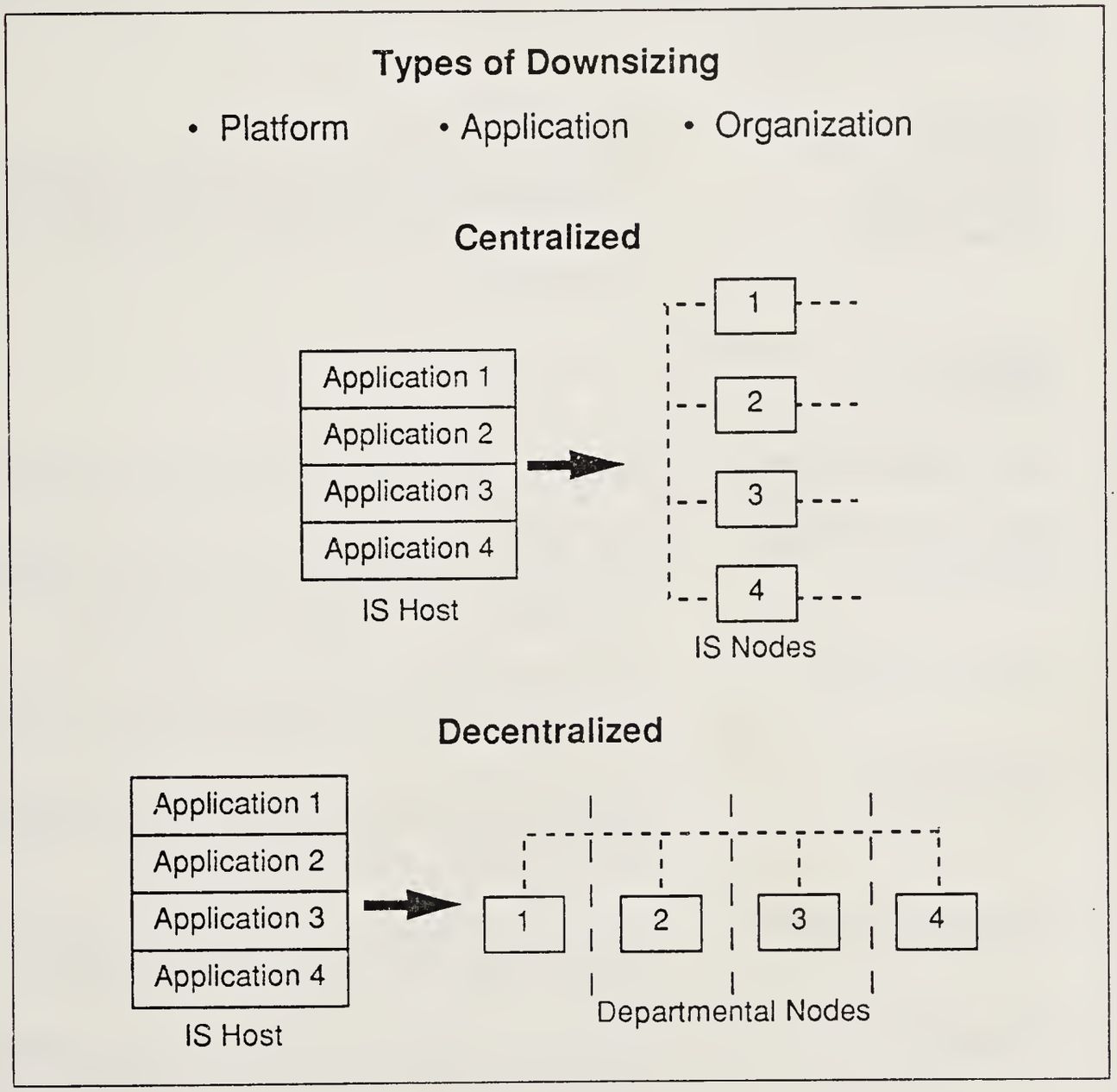
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Downsizing Information Systems Program



Analyzes the downsizing revolution in the 1990s and its impact on users and vendors of information systems and services.

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Downsizing Information Systems Program

Analyzes the downsizing revolution in the 1990s and its impact on users and vendors of information systems and services. In-depth research probes the methods by which organizations can and are downsizing. Critical issues, such as open systems and data security, are addressed.

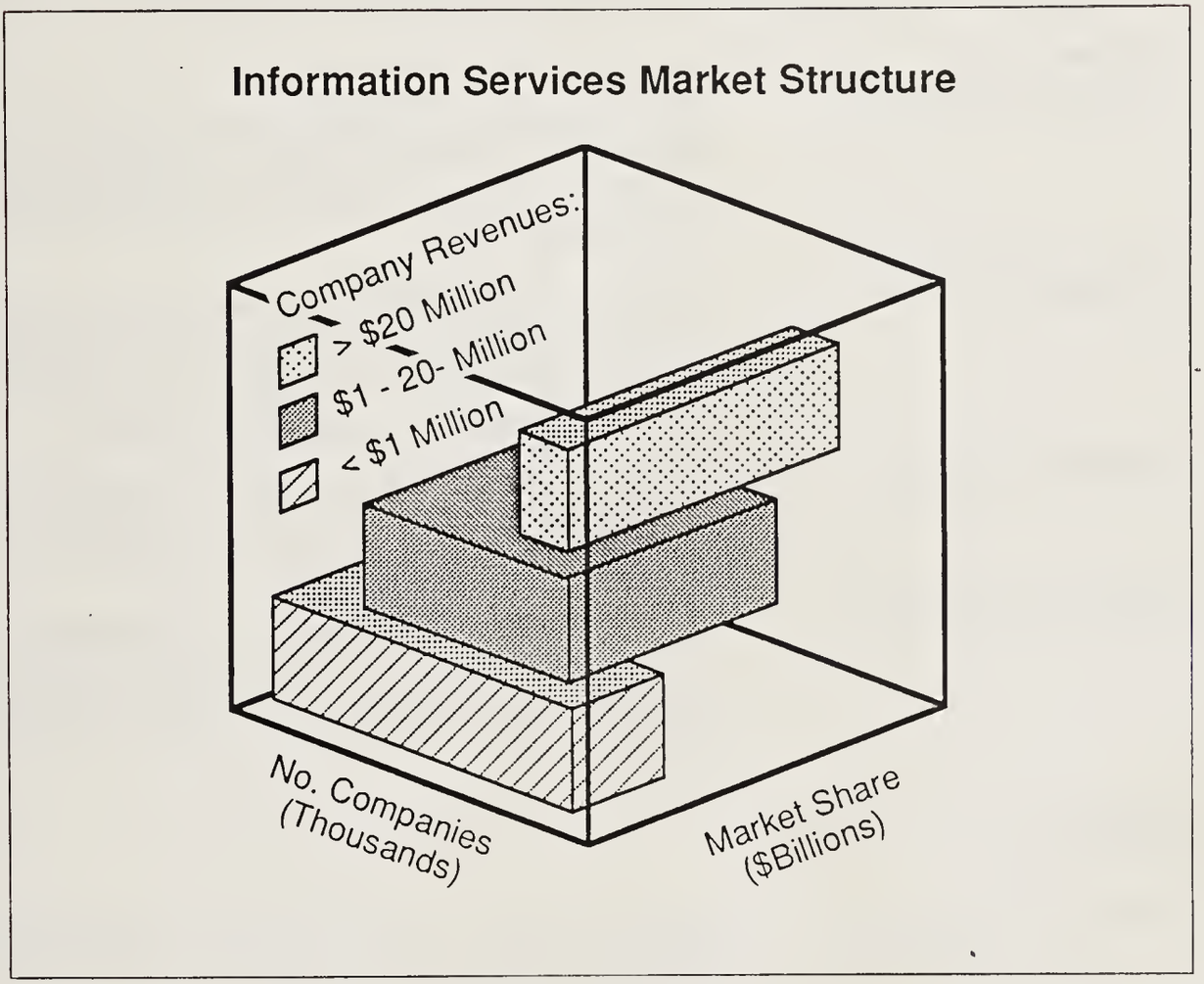
REPORTS AND RESEARCH BULLETINS	Analysis of trends, issues, vendors, opportunities, and actual implementations of downsizing including three types of downsizing: *platform; application; and organization.*

BENEFITS

Save Time and Money	Obtain realistic data on opportunities in downsizing
Keep on Top of this Revolution	Revolution means dramatic, non-linear change. This is happening in downsizing. This program enables you to keep on top of and to predict such changes.
Vendor Analysis	Identify what key vendors are doing in this area. Evaluate the impacts on those vendors most important to you.
Avoid Dangers	In any revolution heads will roll! The information and consulting from this program helps you avoid the dangers inherent in the downsizing revolution.
Consulting Support	Test strategies and tactics through the "hotline" and access to INPUT consultants and executives.
Networking	Develop working relationships with complementary organizations through meetings and INPUT staff.

INPUT®

Information Services Vendor Analysis Program



Guide to the U.S. systems, software, and services vendors—public, private, and hidden. Supports competitive analysis and partnering activities.

- Systems Software Products
- Applications Software Products
- Turnkey Systems
- Equipment Services
- Professional Services
- Systems Integration
- Systems Operations
- Processing Services
- Network Services

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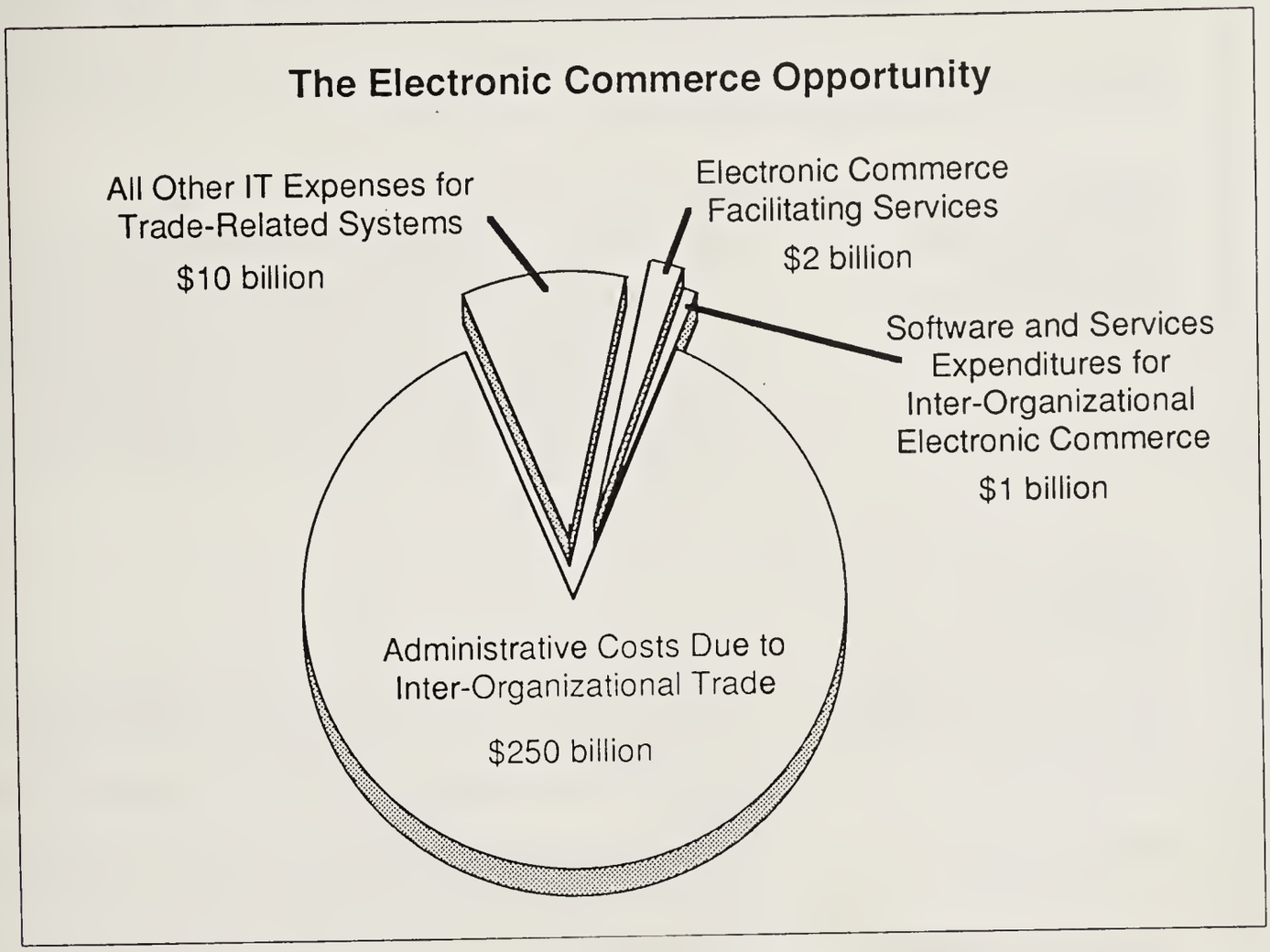
Company Data Base	Data base of over 3,000 public, private, and 'hidden' information services vendors in North America, Europe, and Asia. 'Hidden' vendors include divisions of larger companies.
Company Profiles	Detailed descriptions of companies, their performance, markets, and products. ***Clients select companies to be profiled.*** INPUT selects additional leading vendors. Over 400 vendors are profiled each year.
Research Library	Comprehensive research library of vendors offering information systems and services in the U.S., Europe, and Japan.
Information Access	Obtain answers to your immediate questions on vendors and their activities by telephone, fax, mail, or meetings. Investigate companies for acquisition, partnering, and teaming

BENEFITS

Find the Competition	Identify vendors. Gain up-to-date information on companies entering markets.
Know the Competition	Identify competitors' changes in strategy, affiliation, products, and services. Get tactical profiles of the companies you need to watch. **You can specify companies you want profiled and tracked.**
Monitor Vendor Performance	Track the performance of individual vendors and market groups to determine winning and losing tactics and strategies.
Find Partners	Target companies for potential alliances.
Consulting Experts	Build a relationship with INPUT's professional staff. Test ideas, inquire about vendors and gather data.
Marketing	Promote your company using your Vendor Profile—INPUT's balanced assessment of your company.

INPUT®

EDI and Electronic Commerce Program



Examines the marketing, competitive, and economic issues of the movement from paper to electronic-based commerce.

- Electronic Data Interchange
- Point-of-Sale Data Applications
- Interactive Voice Response and Facsimile Systems
- Reservation Systems
- Buy/Sell Electronic Bulletin Boards
- Electronic Trade Payments
- Electronic Information Services for Commercial Transactions
- Automatic Identification Technologies
- Automated Trading Systems
- Electronic Mail Used for Trade

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INPUT®

EDI and Electronic Commerce Program

—Re-engineering Value Chains through Information and Communication Systems—

Examines the marketing, competitive, and economic issues of the movement from paper to electronic-based commerce.

REPORTS AND INDUSTRY NEWSLETTER

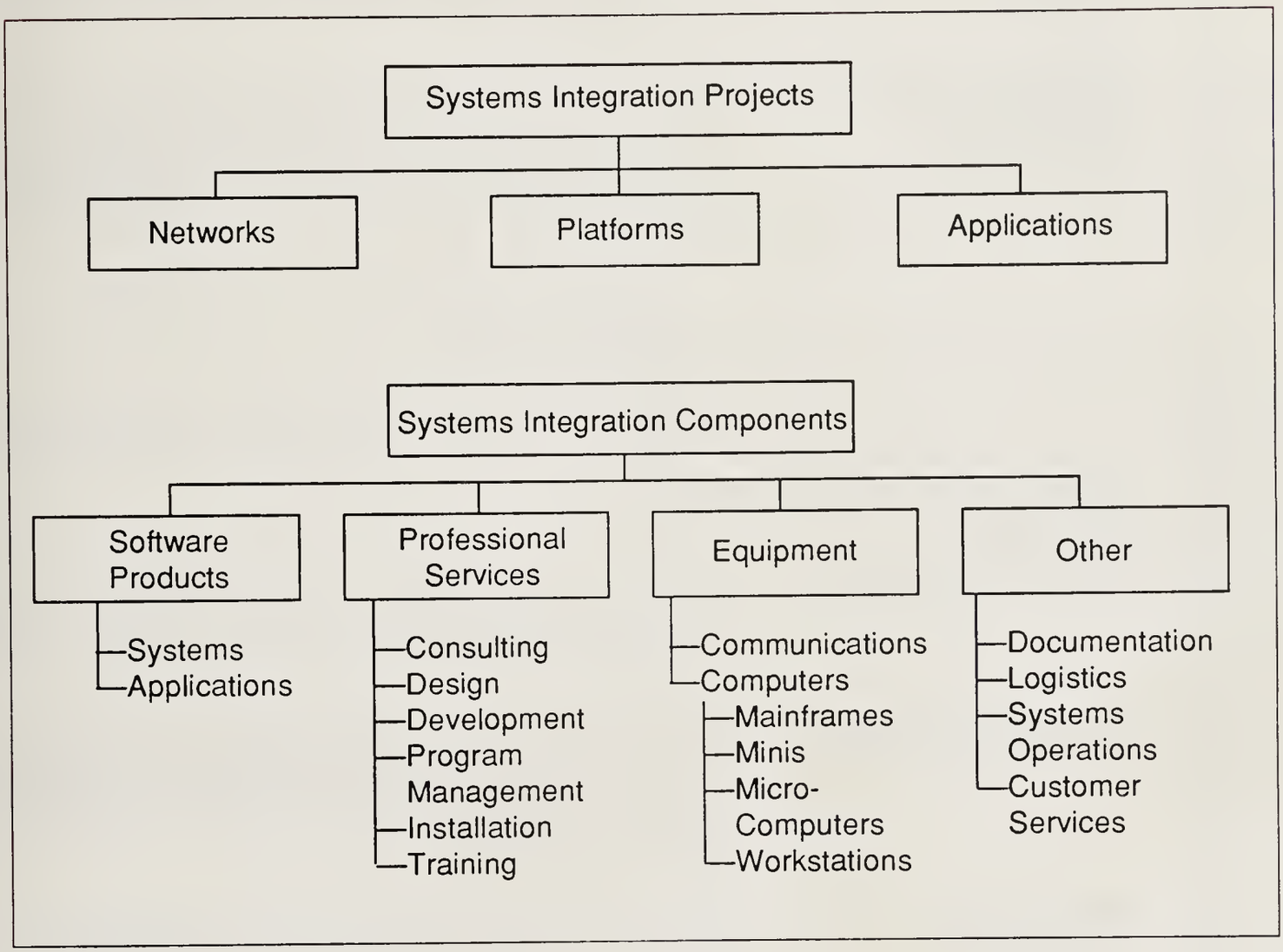
Quantitative and qualitative information on the EDI and electronic commerce systems markets. Forecasts user expenditures on information systems to support these markets. Coverage and analysis of applications, products, and services, including comparisons of competing systems, results from ongoing research, and company profiles.

BENEFITS

Keep on Top of this Dynamic Environment	Avoid surprises, avoid wasted effort. Target your market offerings and activities to fulfill customer needs.
Opportunity Identification	Identify user requirements and "hot" market issues. Make informed decisions. Focus on the needs of individual organizations and whole trading communities.
Plan Re-engineering	Determine from examples how to re-engineer your organization and trading community interfaces. Attack bureaucracy and administrative overhead.
Buying Strategy	Effectively time your information technology investments. Identify, compare, and negotiate information technology purchases.
Consulting Support	Build a professional support relationship with INPUT's experienced consultants. Test marketing ideas, strategies and tactics. Obtain market and vendor insights.
Networking	Develop working relationships with complementary electronic commerce vendors through client conferences and INPUT staff introductions.
Marketing	Promote your company's capabilities and interests through INPUT's worldwide client and contact network.

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U.S. Systems Integration Program



Market and industry research and consultancy service supporting the business intelligence, marketing, and planning functions of organizations involved in systems integration.

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REPORTS AND RESEARCH BULLETINS

SI market forecasts the for the next five years, analyses of trends, issues, competition and opportunities in the rapidly changing SI market for the following market components:

- Computer and communications equipment
- Software products
- Professional services
- Other products and services (e.g., operations support)

BENEFITS

Market Intelligence

Keep on top of SI market changes. Plan ahead so that you are not surprised. Base your plans on realistic, detailed forecasts.

Competitive Strategy

Plan positioning, strategy and tactics based on knowledge of key vendor activities. Plan distribution channel and partnering strategy. Identify potential providers of SI for specific opportunities.

Opportunity Identification

Identify user requirements and "hot" market issues. Make informed decisions. Avoid wasted time and energy: focus on the real needs.

Consulting Support

Build a professional support relationship with INPUT's experienced consultants. Test marketing ideas, strategies and tactics. Obtain market and vendor insights.

Networking

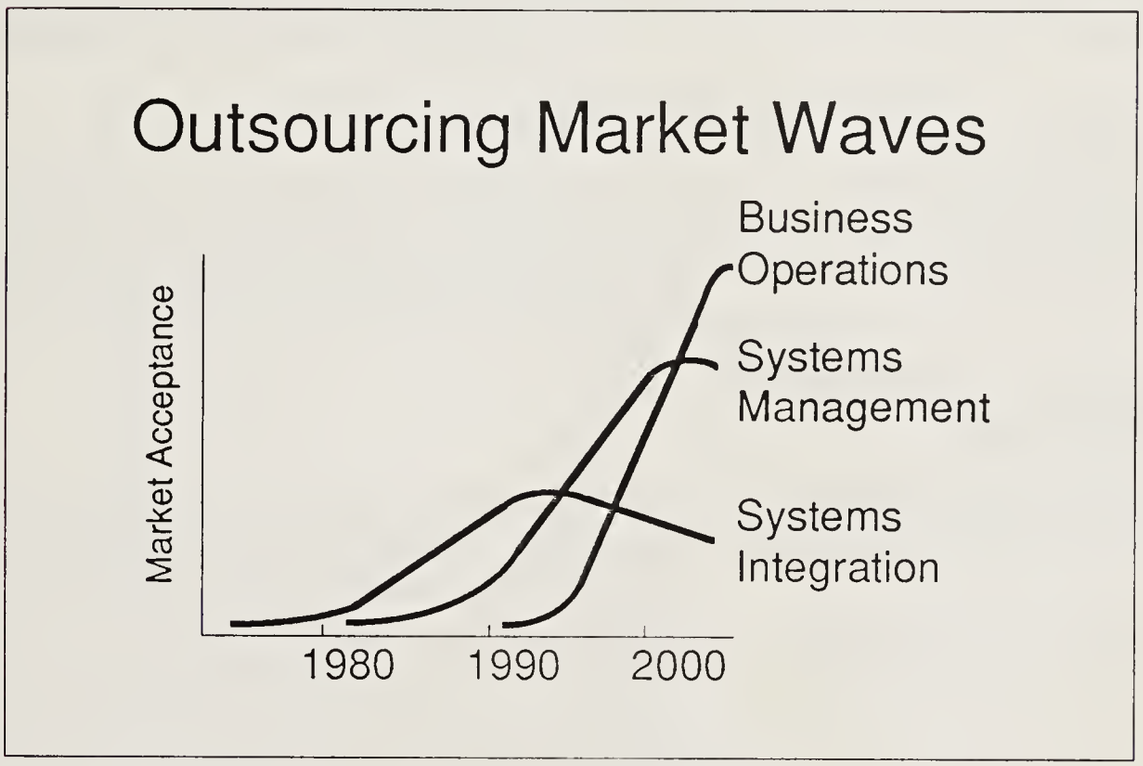
Develop working relationships with complementary outsourcing vendors through client conferences and INPUT staff.

Marketing

Promote your company's capabilities and interests through INPUT's worldwide client and contact network.

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U.S. Outsourcing Information Systems Program



Analyzes the outsourcing information systems revolution in the 1990s.

- Systems Operations
- Network Operations
- Desktop Services
- Applications Development
- Applications Management
- Education and Training

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U.S. Outsourcing Information Systems Program

—*The Potential $50 Billion Market*—

Analyzes the information systems (IS) outsourcing revolution and opportunities in the 1990s. In-depth research covers the outsourcing of systems operations, applications development and maintenance, network operations, and desktop services. Builds on INPUT's 15 years' experience of analyzing the outsourcing phenomenon.

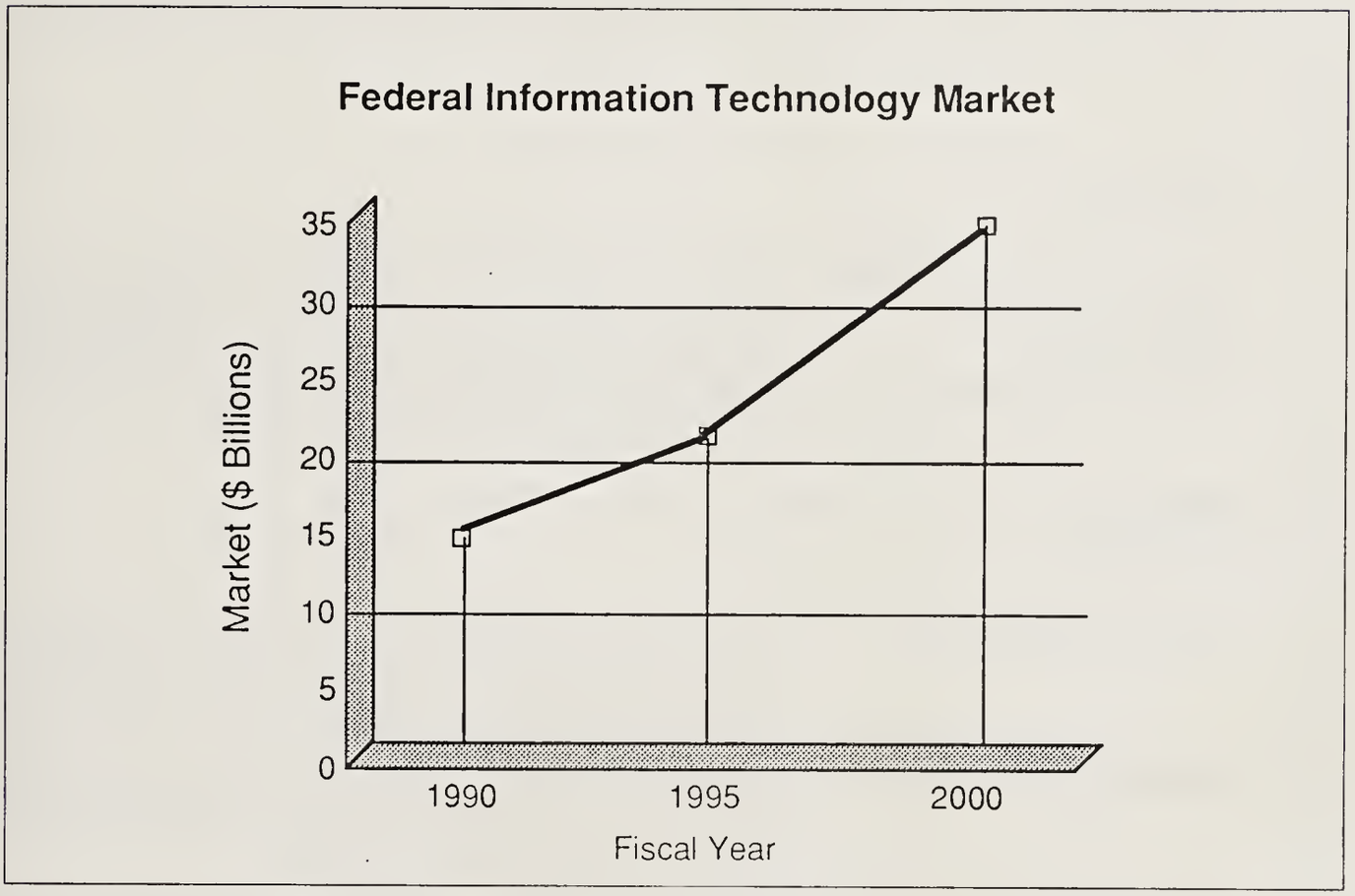
REPORTS AND RESEARCH BULLETINS	Research findings and analyses of important industry announcements, trends, and issues. Examines the reasons for and against outsourcing; emphasis on buyer values, competitive offerings, and contract characteristics.

BENEFITS

Keep on Top of this Revolutionary Market	Revolution means dramatic, non-linear change. This is happening in outsourcing. This program enables you to keep on top of, and indeed to predict, such changes.
Competitive Strategy	Identify what key vendors are doing in this market. Plan distribution channel strategy and competitive positioning. Identify potential, suitable providers of outsourcing services.
Opportunity Identification	Identify user requirements and "hot" market issues. Make informed decisions. Avoid wasted time and energy: focus on the real needs.
Consulting Support	Build a professional support relationship with INPUT's experienced consultants. Test marketing ideas, strategies and tactics. Obtain market and vendor insights.
Networking	Develop working relationships with complementary outsourcing vendors through client conferences and INPUT staff.
Marketing	Promote your company's capabilities and interests through INPUT's worldwide client and contact network.

INPUT®

Federal Information Technology Market Program



Analyzes the information technology plans and opportunities in the U.S. federal government

Forecasts markets for:

- Computer Equipment
- Software Products
- Systems Operations
- Processing Services
- Network Services
- Professional Services
- Systems Integration
- Turnkey Systems
- Office Information Systems
- Maintenance Services
- Telecommunications Systems and Services

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Federal Information Technology Market Program

Analyzes the information technology (IT) plans and opportunities of the federal government. In-depth research on forces driving the market, technology and procurement trends. Forecasts information technology markets and analyzes competitors' positions in them.

REPORTS

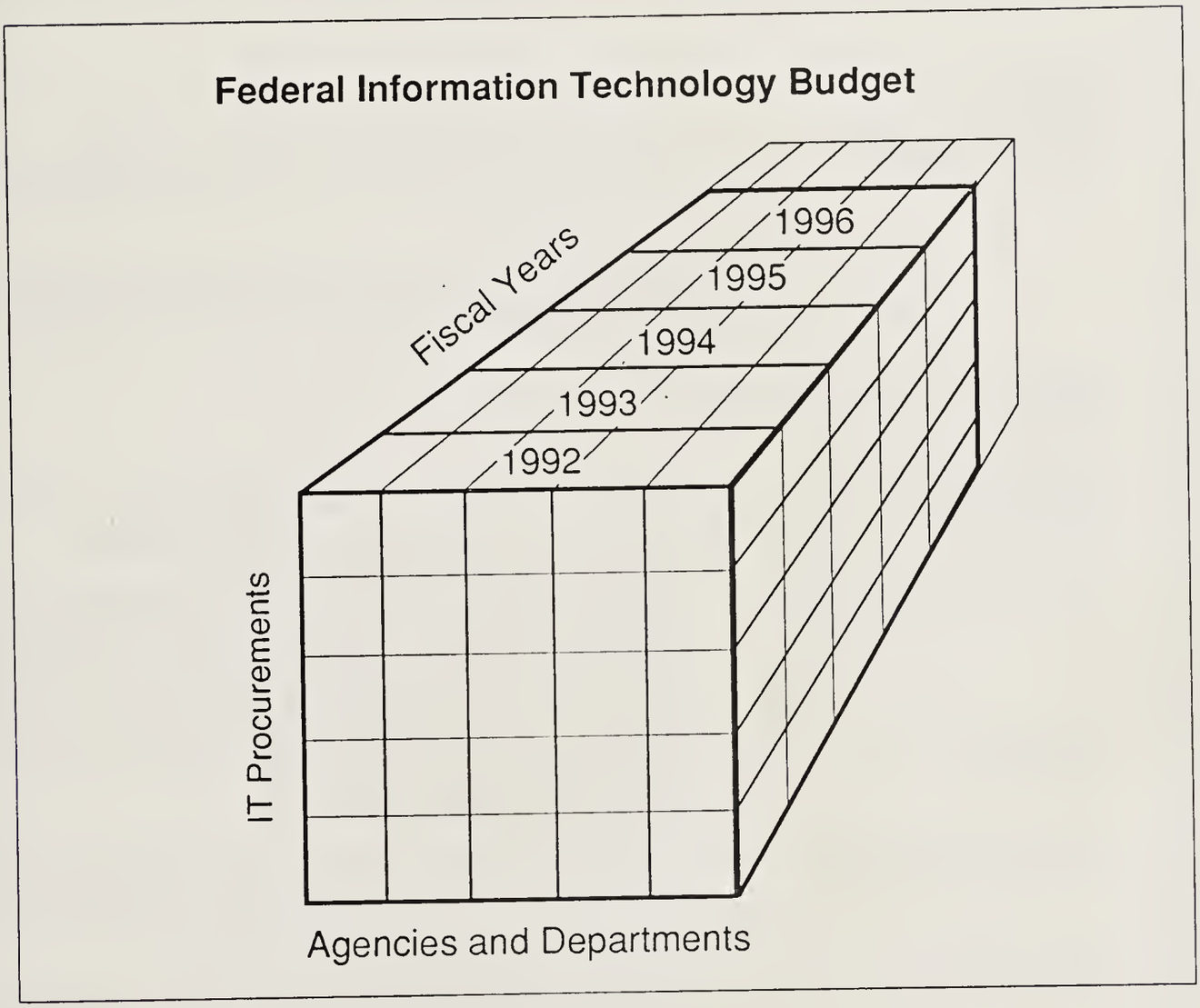
Federal Market Reports Agency and Issue Reports and Research Bulletins	Research findings and analysis of important industry announcements, trends, and issues. Methods and practices of government contracting for information technology; emphasis on buyer values, competitive offerings and contract characteristics.

BENEFITS

Market Intelligence	Keep on top of federal market changes. Understand and act on the driving forces identified by realistic, detailed, well-informed forecasts of federal IT market segments.
Competitive Strategy	Identify what key vendors are doing in this market. Plan teaming and competitive strategy. Identify competition for federal systems and services.
Opportunity Identification	Commit internal resources to those products and services with the greatest federal market potential.
Consulting Support	Build a professional support relationship with INPUT's experienced consultants. Take advantage of INPUT's government contacts and insights.
Networking	Develop working relationships with complementary vendors through client conferences and INPUT staff.
Marketing	Promote your company's capabilities and interests through INPUT's industrywide client and contact network.

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Federal Information Technology Procurement Program



- **Identifies, describes, and tracks over $20 billion of planned information technology procurements by the federal government**
- **Supports client marketing activities relative to these procurements**

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INPUT®

Federal Information Technology Procurement Program

Identifies, describes, and tracks over $20 billion of planned information technology (IT) procurements by the federal government. Supports client marketing activities relative to these procurements.

REPORTS AND DATA BASE

Program descriptions, analyses, and lead information on more than 400 active federal IT procurements.

Descriptions of over 1,000 prospective and awarded procurements in a user-friendly PC data base.

BENEFITS

Opportunity Identification

Identify real procurement opportunities. Make informed decisions. Avoid wasted time and energy.

Outsourcing

Outsource the procurement data collection process to INPUT's FITPP to provide objective evaluation of opportunities. For smaller companies, the FITPP outsources the marketing department to support sales.

Teaming

Support teaming and competitive analysis activities during the bidding process.

Consulting Support

Build a professional support relationship with INPUT's consultants. Test marketing ideas, strategies and tactics. Obtain market and vendor insights.

Networking

Develop working relationships with complementary vendors through client conferences and INPUT staff.

Marketing

Promote your company's capabilities and interests through INPUT's client and contact network.

FOIA

Request agency documentation and contracts through INPUT while maintaining competitive security.

INPUT®

Downsizing Information Systems Program

LIBRARY OF 1991 REPORTS

Buying Outside Services—A survey-based assessment of the manner in which the user (end user and information systems) are managing the process of buying software products and services. This has impacts for outsourcing and for a number of vendor issues.

Open Systems Strategies—A number of major systems vendors have adopted open systems strategies. What is the real acceptance in the traditional information systems arena?

Putting Downsizing in Perspective—An analysis of the current attitudes and plans of information systems executives and vendors concerning the implementation of downsized technology. What are the underlying issues? How fast will progress be made? And where are vendors headed?

The Future of CASE: 1991-1996—An updated look at CASE, the progress made in its use, and the progress made by the vendors. An update of the 1988 five-year forecast is included.

The U.S. UNIX Market, 1991-1996—The 1989 UNIX Software Products report is updated with new and increased user research and an assessment of the progress with open systems strategies of key computer systems vendors. A new five-year forecast is provided.

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London—Tel. (071) 493-9335; Fax (071) 629-0179. Frankfurt—Tel. (0) 6447-7229; Fax (0) 6447-7327.
Paris—Tel. (33-1) 46 47 65 65; Fax (33-1) 46 45 69 50. Tokyo—Tel. (03) 3864-0531; Fax (03) 3864-4114.

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U.S. Systems Integration Program

LIBRARY OF 1991 REPORTS

Systems Integration Market Analysis—Examines SI issues and trends in the U.S. domestic market. SI user expenditures are forecast for the next five years by vertical industry, and marketing strategies and recommendations are included.

Systems Integration Vendor Analysis—Includes detailed profiles of the major SI vendors including organization, capabilities, business results, strategies, market focus, alliances, and INPUT's assessment of strengths and weaknesses.

Systems Integration Technology Trends—Examines technologies currently being implemented in SI programs and projects and examines those users will seek over the next five years.

Subcontracting to Client Integrators—Focuses on the SI opportunities in the secondary SI market of user-managed projects. Includes a five-year forecast of user expenditures and recommendations for participation in this market segment.

Systems Management Direction and Priorities—This report examines the major factors that are causing the accelerated acceptance of systems integration and systems operations. It identifies the systems management trends that can be anticipated in the decade ahead.

Systems Integration Data Base—Reports from INPUT's SI project data base of important projects are published periodically.

U.S. Systems Integration Program is available from INPUT,
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Detailed description of services and fees also available upon request from INPUT's offices in New York (201) 801-0050 or Washington, D.C. (703) 847-6870.

U.S. Systems Integration Program

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☐ Subscription to INPUT's U.S. Systems Integration Program with library of 1991 reports at the fee of $24,500

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Outsourcing Information Systems Strategy Program

LIBRARY OF 1991 REPORTS

U.S. Systems Operations/Outsourcing Market Analysis, 1991-1996—Examines SO issues, trends, and marketing strategies in the U.S. domestic market, including a forecast of SO user expenditures by vertical industry for the next five years.

Systems Operations Vendor Analysis—Detailed profiles of major SO vendors: organization, capabilities, business results, strategies, market focus, alliances, and INPUT's assessment of strengths and weaknesses.

Systems Operations Buyers' Issues and Alternatives—Examines the driving forces and major issues facing the information systems function. Looks in-depth at the considerations involved in employing a systems operations firm from the corporate, information systems and end-user perspectives.

Systems Management Priorities and Directions —Examines major factors causing accelerated acceptance of systems integration and systems operations. Identifies the systems management trends that can be anticipated in the decade ahead.

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Outsourcing Strategy Program

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Federal Information Systems and Services Program

LIBRARY OF 1991 REPORTS (CONTINUED)

FEDERAL MARKET BULLETINS

Uncompensated Overtime—Addresses the controversial practices of some professional services firms to bid more than 40 hours of work weekly, thus lowering hourly rates and, in many cases, improving their competitive standing.

Federal Anti-Drug Program—Identifies and analyzes the IS activities relating to federal drug interdiction and drug-abuse prevention programs, both overall and by participating agencies.

Federal 8(a) Program—Discusses the new rules relating to minority- and woman-owned businesses, and their direct effects on federal IS procurements, including subcontracting relationships.

GSA Schedule Practices—Analyzes new GSA policies on dealers, schedules, cost and pricing data, as well as providing business volumes in various schedule categories.

BRIEF UPDATES

As part of the 1991 subscription, INPUT will update the market analysis, forecast, and opportunity lists for the following INPUT market reports, published in either 1989 or 1990:

- *Federal Electronic Data Interchange Market*
- *Defense Logistics Agency Information Systems Market*
- *NASA Information Systems Market*
- *Federal Computer Security Market*

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Service Agreement

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☐ Add on Library of 1991 reports at the fee of $8,000 (does not include PAR)

☐ Market Analysis Reports only at the fee of $15,000

☐ Procurement Analysis Reports only at the fee of $15,000

☐ Automated Procurement Analysis Reports *with* the Federal Information Systems and Services Program *or* the Procurement Analysis Reports at the additional fee of $2,000

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Information Services Industry Program—Western Europe

LIBRARY OF 1991 REPORTS

MARKET SECTOR REPORTS

The Western European Market for Computer Software and Services, 1991-1996—This report summarises the market forecasts for the software and services sector, including: applications software, turnkey systems, processing services, systems software, network-based services, systems operations and systems integration. It provides market sizes for 1990, with forecasts for 1991-1996, and also provides a country breakdown of the market. Each delivery mode is segmented into subsectors.

Processing Services Opportunities—Western Europe, 1991-1996—There will be a major restructuring of the transaction processing market over the next decade. This report will help vendors to understand what changes are taking place and how they are affecting businesses. Research shows that there are significant opportunities available for vendors, despite a decline in growth rate. The report provides market forecasts and vendor rankings, with percentage market shares for each vendor.

Professional Services Opportunities—Western Europe, 1991-1996 —This report provides market forecasts and growth rates for the European professional services market and assesses the impact of the trends in the marketplace on professional services vendors. It also discusses users' concerns and requirements so that vendors can evaluate their strengths and weaknesses. The report identifies leading vendors, providing valuable competitive information.

European Software Applications Solutions Opportunities, 1991-1996—This report forecasts the size of the applications solutions market, identifies the leading vendors and discusses the trends affecting the market in each European country. It discusses the opportunities for vertical market products, cross-industry market products, application software products and turnkey systems. It discusses market issues, such as industry standards, quality and integration. The report provides valuable market intelligence for companies involved in selling and marketing software products.

Information Services Industry Program—Western Europe

Systems Software Products—Western Europe, 1991-1996—This report examines the market for systems software products, segmented into systems control products, application development tools and data centre management products. The report discusses trends such as the move towards distributed processing and assesses the likely effect on the systems software market. The impact of open systems is also discussed. Companies offering systems software products can find in this report valuable market size and growth data, analysis and competitive information.

INDUSTRY SECTOR REPORTS

European Software and Services Market, 1991-1996 —Insurance Sector—In the insurance sector report, INPUT breaks down the market into life, non-life and reinsurance and discusses the opportunities available in each sector. Regulatory issues affecting the market are discussed, and there is a review of merger and acquisition activity, which is one of the driving forces in the market for software and services in this sector. Software and services vendors in this sector can gain an accurate overview of the European market for their services in the insurance sector.

European Software and Services Market, 1991-1996—Banking and Finance Sector—INPUT's banking and finance sector report explains how banking and finance markets are restructuring and details how this will affect software and services vendors. The report contains detailed market forecasts, profiles leading vendors and recommends vendor strategies for the 1990s in this fast-growing sector.

European Software and Services Market, 1991-1996—Discrete Manufacturing Sector—INPUT's discrete manufacturing sector report evaluates the impact of trends in the this sector on the software and services market. Software and services vendors active in the manufacturing sector will find that this report provides them with detailed market forecasts, identifies the leading vendors and the key opportunities available. The report can make a valuable contribution to vendor companies' strategic planning.

European Software and Services Market, 1991-1996— Process Manufacturing Sector—This companion volume examines the issues and trends in the process manufacturing sector and assesses their impacts on the software and service market. The report will help vendor companies, and those considering entering the market, to plan their future strategies by providing detailed five-year market forecasts and identifying the key opportunities available.

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European Software and Services Market, 1991-1996—Retail and Wholesale Distribution Sector—This report analyses the market for software and services in the distribution industries of Western Europe. Software and services vendors can find out what the major trends, issues and opportunities are, and are provided with market forecasts for wholesale and retail activities in France, Germany, Spain, the U.K. and the rest of Europe.

TOPIC REPORTS

Education and Training—This report surveys developments in education and training in the software and services industry, examining issues such as skills shortages and retraining. This report can help vendors of education and training services to assess the level of interest in various types of training services by examining the requirements for training and providing data on levels of satisfaction with training standards. The report also highlights differences in European countries, and discusses governmental issues.

Software Applications Maintenance—This report examines the specific area of user-written software applications maintenance. It identifies the business opportunities in this rapidly developing business sector of the professional services market. The report also addresses such issues as the use of reverse engineering tools and provides market sizing and competitive information.

UNIX Market Opportunities—UNIX has become an important operating system as suppliers move away from their own proprietary systems. This report examines the opportunities being created in this market for consulting services and other professional services, software products and related areas. The report provides European country market analyses and competitive information.

Collaboration and M & A Issues—As European software and services companies plan their business strategies for the 1990s, many are entering new markets by entering into partnerships and acquisition activity. As companies compete against pan-European giants in a single market, it is becoming essential for them quickly to acquire market penetration into new countries, or to able to offer new skills. This can be achieved by establishing partnerships or by seeking to acquire companies already operating in target markets. This report examines the issues and discusses the implications of such strategic activity. specific issues and interests in complete confidence, away from competitors.

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MARKET ANALYSIS REPORTS

Western European Customer Services Market Analysis and Forecast, 1991-1996—This report surveys the market for customer services and forecasts user expenditures on equipment and systems software maintenance, professional services and education and training associated with equipment and systems software. The report enables customer service executives to size the market and gain valuable knowledge about differences among countries, and differences in spending among various market sectors.

Independent Maintenance—Western Europe, 1991-1996—Independent maintenance vendors are still gaining market share, but as service revenues from equipment maintenance decline, independent vendors face the challenge of creating alternative, higher-growth revenue streams. This report is crucial for independent vendors and equipment vendors to gain valuable competitive information and an informed view of the future market directions for independent maintenance companies. The report profiles leading independent maintenance companies, sizes the market and discusses market penetration trends.

USER TRENDS AND ISSUES REPORTS

Customer Service in Western Europe, 1991—User Satisfaction Analysis—This set of three reports, covering large systems, medium systems and PCs and workstations, gives customer service executives valuable data on user satisfaction. In 1990, INPUT surveyed well over 1,000 users in Europe. The reports allow vendors to make comparisons with other vendors' ratings, overall European ratings and also allow for comparisons with the previous years' results.

Customer Service in Western Europe, 1991-1996—User Issues—This companion set of reports builds upon INPUT's extensive user research to highlight issues in European customer service. These three volumes cover large systems, medium systems and PCs and workstations, and they provide analysis on clients' attitudes and concerns. The reports provide valuable evaluation of the issues, and give advice and recommendations to vendors based upon the European survey of over 1,000 customer service users.

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PROFESSIONAL SERVICES REPORTS

Environmental Services for Western European Customer Services Vendors, 1991-1996—This report can assist customer service organisations that are already involved in providing environmental services or that are considering entering the market. Many customer service vendors are broadening their service portfolios, offering services such as structured wiring, air conditioning and power sources. This is creating an important alternative revenue stream. The report can help vendors consolidate their positions by defining and sizing the market and discussing the opportunities available. User and vendor issues are discussed.

Systems Operations for Customer Service Vendors in Western Europe, 1991-1996—As a high-growth area, this market provides customer service vendors with an opportunity to regain some of the lost revenues caused by a slowdown in the growth from equipment maintenance revenues. The report sizes the market in Europe and identifies vendors already active in this area. It recommends strategies for vendors to enter the market and contains discussion on user issues, so that executives can target the opportunities effectively.

Channel Support Issues in Western European Customer Services, 1991-1996—As more and more sales are derived from indirect channels, important issues are raised. One major concern is that the VARs, dealers and distributors are selling equipment without necessarily having the expertise to support it. This often results in users becoming isolated from the equipment vendors. This report will assist equipment vendors and third-party organisations to avoid some of the pitfalls in supporting their users, and recommends strategies for increasing user satisfaction with service.

Software Support Issues in Western European Customer Services, 1991-1996—Customer service vendors need to extend their levels of software support as they widen their portfolio of services. This report examines the issues of providing full software support for both systems and applications software. The report can help customer service organisations to plan their future strategies for providing full software support by discussing the skill requirements needed, user expectations, and the future direction of software support services.

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SYSTEMS INTEGRATION REPORTS

Systems Integration Market Analysis and Forecast—Western Europe, 1991-1996—This report examines demand and market forces in Europe for systems integration. For each country market, the report estimates the market size, forecasts market growth and identifies the leading vendors. The report provides valuable insight into the current market environment and can assist companies with their strategic planning activities.

Vendor Alliances and Strategies in Western European Systems Integration Markets, 1991-1996—This report examines the European systems integration market from a vendor point of view, identifying and commenting on the major challenges that face systems integration vendors. Bidding for systems integration contracts carries a potentially high risk factor, and the report examines vendor strategies for reducing this risk. It also discusses how vendors are forming alliances to gain the necessary expertise to bid successfully.

Marketing Issues in Systems Integration Markets—Western Europe, 1991-1996—This report examines the systems integration market from a user's viewpoint, to enable companies operating in systems integration markets to better understand client requirements. The report investigates the major issues in industry markets that are leading users towards systems integration contracts, and examines user issues and concerns about selecting a vendor.

Imaging Opportunities in Western European Systems Integration Markets, 1991-1996—This report examines opportunities in this exciting, emerging technology. Now that pictures, photographs and film can be stored electronically, a plethora of opportunities is arising for integrating such technology into users' information systems. Computerised personnel records can contain photographs and banks can store copies of cheques. This report sizes the market for imaging systems and identifies leading vendors active in the market, providing valuable competitive information for companies involved in, or considering entering, the market.

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SYSTEMS OPERATIONS REPORTS

Systems Operations Market Analysis and Forecast—Western Europe, 1991-1996—This report examines the demand and market forces in each European country market. Leading vendors are listed and their market shares identified. The report also examines the impact of systems operations on other markets in the software and services industry. The report provides valuable market size data and competitive information for European companies involved in, or considering entering, the systems operations market.

Vendor Alliances and Strategies in Western European Systems Operations Markets, 1991-1996—This report examines the trends affecting systems operations markets from a vendor point of view. It discusses the main issues of bidding for, and managing, systems operations contracts, and identifies the necessary vendor skills. This report is of value to companies already active in the market, and can also assist those outside the market to understand the effect of trends on their own activities.

Marketing Issues in Western European Systems Operations Markets, 1991-1996—This report identifies user attitudes, and assesses their significance for systems operations vendors. The report examines, from a user's point of view, the main issues in contracting out the operations of an information system. The report analyses these user attitudes, and systems operations vendors can benefit from INPUT's recommendations for vendor marketing strategies.

Network Management in Systems Operations Markets—Western Europe, 1991-1996—Computer systems today increasingly involve some networking capability. This presents particular niche opportunities for systems operations vendors to manage the network on behalf of the user. This report examines the opportunities available in this market, discusses user requirements for network management and assesses the skills that vendors need to be able to offer in order to enter the market.

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MARKET REPORT

The Western European Market for Network Services, 1991-1996—This report provides an analysis and forecast for the network services sector of the European network services market. The network services market is segmented into network applications (managed network services, messaging services, EDI and other application services) and electronic information services (on-line databases and news services). The report provides forecasts for industry-specific and cross-industry expenditures as well as market share analysis and identification of leading vendors.

TOPIC REPORTS

Western European EDI Developments, 1991-1996—This report examines the opportunities available to vendors of electronic data interchange services. It covers all major European countries, profiles leading vendors and identifies the challenges that vendors are likely to face over the next five years, such as the need to be able to offer an EDI service which handles all classes of networks on an end-to-end basis.

Financial Network Services—Western Europe, 1991-1996—This report examines the new opportunities that will result from the proposed deregulation of telecommunications carriage. The market is becoming more competitive as a result of new players entering the market, so it is even more important for vendors to be knowledgeable. This report provides a complete overview of the current market environment and can make a valuable contribution to strategic planning activities.

Opportunities in ISDN and Other Emerging Technologies in Western Europe, 1991-1996—Continuing developments of telecommunications technology will open up new service opportunities for network services vendors in an increasingly competitive environment. However, user inertia and the complexities of network use present very real difficulties for both users and vendors in fulfilling their potential. This report explores the dynamics of this situation and provides insight into the most profitable market opportunities and the ways they can be exploited.

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USER ISSUES REPORT

User Issues in Network Services Markets—Western Europe, 1991-1996—This report examines the network services market from a user viewpoint. It discusses the issues that concern users and analyses their requirements for network services over the next five years. As networks are playing a more critical role in users' information systems, users' demands and expectations are increasing. It is vital for suppliers of network services to understand the changes that are taking place in the market.

VENDOR REPORT

Western European Network Service Provider Profiles—This report contains profiles of leading European network service providers. The profiles provide vendors with valuable, strategic information on their competitors by describing each company's products and services, listing geographic markets served and giving a history of merger and acquisition activity. The profiles also give a five-year financial analysis of each company's revenues and a description of the company's business strategy.

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...NCP Corp
...Systems
...Nippon Te...
...
...

Representative Corporate Client List

INPUT®

Alldata GMBH
Alliant Computer Systems
Amdahl Corp.
American Coastal Industries
American Express
Andersen Consulting
Apple Computer, Inc.
Arinc Research Corp.
AT&T
Automated Sciences Group, Inc.
BDM International, Inc.
Bell Atlantic
Bellcore
Bellsouth Corp.
Boeing Computer Services Co.
Booz, Allen & Hamilton, Inc.
British Telecom
Broadview Associates
Bull
CACI
CAP Gemini America
CAP Gemini Sogeti
Centre-file, Ltd.
Chartway Technologies
Cincinnati Bell
Commission of the European Communities
Computer Associates
Computer People
Computer Resource Management
Computer Sciences Corp.
Computer Task Group
Concept Automation, Inc.
Contel Federal Systems
Control Data Corp.
Convergent Solutions, Inc.
Coopers and Lybrand
Dataserv
Debis Systemhaus GmbH
Digital Equipment Corp.
D&B Software
EDS Corp.
ENSCO, Inc.
Ernst & Young
Federal Data Corp.
Finsiel Spa
FMC Corp.
France Telecom
Fujitsu Limited
General Electric Information Services Co.
GENIX Corp.
Grumman Data Systems Corp.
GSI Corp.
GTE
HFSI
Harris Government Systems
Hewlett-Packard Co.
Hitachi
Hughes Aircraft Co.
IBM Corp.
ICF Severn, Inc.
IDB for Northern Ireland
IMI Systems, Inc.
Industry, Science & Technology
I-NET
Information Associates, Inc.
Information Systems Management
Institutional Communications
Integrated Computer Systems
International Computers Limited (ICL)
Japan Information Processing Center
Kidder Peabody
KnowledgeWare, Inc.
Legent Corp.
Litton Computer Services
Lockheed Missiles & Space
Logicon
Martin Marietta Data Systems
Maxima Corp.
McDonnell Douglas
McKinsey & Co.
Mellon Bank Corp.
Meta Management Consulting
Micro-Computer Systems, Inc.
Microsoft Corp.
Moore Corp.
Motorola
MPACT EDI Systems, Inc.
National Systems and Research Co.
NCI Information Systems
NCR Corp.
NEC
Network Systems
Newbridge Networks, Inc.
Nippon Telegraph & Telephone
Northern Telecom
Novacom
Novell, Inc.
NTT America, Inc.
Nynex Corp.
Ogden/ERC Government Systems
Oracle Corp.
Orkand Corp.
Pacific Telesis
Page Iberica S.A.
Paxus Corp.
Perot Systems Corp.
Philips Information Systems
Price Waterhouse
Prime Computer
PSI International, Inc.
Raet NV
Rank Xerox
RJO Enterprises, Inc.
RMS Technologies
Samsung Data Systems Co.
Science Council of Canada
SEMA
SERICS
Sligos
Software Engineering, Ltd.
Softech, Inc.
SONY Corp.
Southwestern Bell
Statisticia, Inc.
Sterling Software, Inc.
ST Systems Corp.
Stratus Computer, Inc.
Sungard Data Systems
Sun Microsystems
S.W.I.F.T. Terminal Services
Syscon Corp.
Systemhouse, Inc.
Tandem Computer, Inc.
Technology Applications, Inc.
Teradata
Texas Instruments
Timeplex, Inc.
TRW
Thomainfor
Toshiba
Transpac/DC-DMVA
TSC, Inc.
Unisys Corp.
University of California
Vanguard Information Center
Vitro Corp.
VSE Corp.
Welsh, Carson, Anderson & Stowe
Westinghouse Electric Corp.
Ziff-Davis Technology Information Center

Grumman Data Systems Corp.
GTNIX Corp.
General Electric Information
Services Co.
Fujitsu Limited
France Telecom
FMC Corp.
Finsiel Spa
Federal Data Corp.
Ernst & Young
ENSCO, Inc.
EDS Corp.
D&B Software
Delphi Systemhaus GmbH
Digital Equipment Corp.
Dun & Bradstreet
Doors and Eyebrand
Convergent Solutions, Inc.
Control Data Corp.
Microsoft Corp.
Moore Corp.
Motorola
MPACT EDI Systems
National Systems and
Co.
NCI Information Systems
NCR Corp.
NEC
Network Systems
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Nippon Telegraph & Te
Northern Telecom
Novacom
Novell, Inc.
NTT America, Inc.
Nynex Corp.

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Novacom
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NTT America, Inc.
Nynex Corp.
Ogden/ERC Government Systems
Oracle Corp.
Orkand Corp.
Pacific Telesis
Page Iberica S.A.
Paxus Corp.
Perot Systems Corp.
Philips Information Systems
Price Waterhouse
Prime Computer
PSI International, Inc.
Raet NV
Rank Xerox
RJO Enterprises, Inc.
RMS Technologies
Samsung Data Systems Co.
Science Council of Canada
SEMA
SERICS
Sligos
Software Engineering, Ltd.
Softech, Inc.
SONY Corp.
Southwestern Bell
Statisticia, Inc.
Sterling Software, Inc.
ST Systems Corp.
Stratus Computer, Inc.
Sungard Data Systems
Sun Microsystems
S.W.I.F.T. Terminal Services
Syscon Corp.
Systemhouse, Inc.
Tandem Computer, Inc.
Technology Applications, Inc.
Teradata
Texas Instruments
Timeplex, Inc.
TRW
Thomainfor
Toshiba
Transpac/DC-DMVA
TSC, Inc.
Unisys Corp.
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